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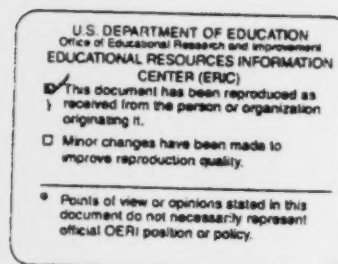
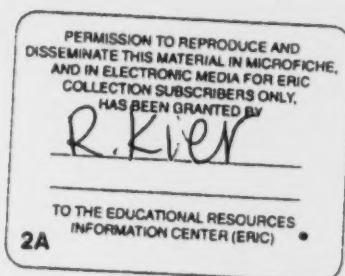
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ABSTRACT

This publication provides information about the allocation of funds for student support to higher education institutions in England in 2002-2003. It also requests monitoring information on their use. The report contains background information on student support funding for 2002-2003 and guidance information issued by the Department for Education and Skills. The minimum allocations for Hardship and Bursary (a student support grant) funding are reviewed, and the minimum allocations of administrative funds for 2002-2003 are outlined, as is the initial allocation for Opportunity Bursaries for 2002-2003. The monitoring information required from the institutions by November 6 is also detailed, and the dates by which this information is required are listed. The Department for Education and Skills has made 92 million British pounds available to higher education institutions for student support funding in 2002-2003, representing no significant changes to the overall package of support available in 2002-2003 compared to that of 2001-2002. (Contains 13 tables.) (SLD)

March 02/15

Report



Information on quality and standards in higher education

Final report of the Task Group

HIGHER EDUCATION
FUNDING COUNCIL
FOR ENGLAND

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Student support funding for higher education institutions 2002-03

To	Heads of HEFCE-funded higher education institutions
Of interest to those responsible for	Student support services; Administration of funds and loans; Finance (including directors of finance)
Reference	02/12
Publication date	March 2002
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Contents

	Page
Executive summary	3
Background	4
Part 1 Minimum allocation of Hardship/Bursary funds and administrative costs 2002-03	7
Part 2 Revised initial allocations of new and continuing Opportunity Bursaries 2002-03	13
Part 3 Access Bursaries and Hardship Fund guidance 2002-03	19
Introduction	20
Section 1 Essential information for administrators	22
Section 2 Hardship Fund guidance	26
Section 3 Guidance on Fee Waivers for part-time students	31
Section 4 Financial conditions and auditing requirements	33
Section 5 Frequently asked questions	34
Annex A Definition of registered and accredited childcare	37
Annex B Form of words for students to give their Benefits Office	38
Annex C Residency requirements	39
Annex D Dance and drama awards (connected institutions)	53
Annex E Advice on issuing short-term loans from the Hardship Fund	54
Annex F The Foyer scheme	55
Part 4 Summary report for the use of student support funds in 2000-01	56
Appendix 1 Summary data from the Opportunity Bursaries 2001-02 interim return and the 2000-01 Access and Hardship fund monitoring return	58
Part 5 Amended Opportunity Bursaries 2002-03 interim return	63
Part 6 Monitoring return 2002-03	64
Opportunity Bursaries 2003-04 interim return	64
2002-03 Access and Hardship monitoring return	65

Executive summary

Purpose

1. This publication provides information about the allocation of funds for student support to higher education institutions in 2002-03, and requests monitoring information on their use.

Key points

2. This document supersedes all previous guidance. It includes:

- background information on student support funding for 2002-03
- the Department for Education and Skills' guidance to institutions for 2002-03
- minimum allocations for Hardship and Bursary funding for 2002-03 (Part 1)
- minimum allocations of administration funds for 2002-03
- initial allocation for Opportunity Bursaries for 2002-03
- monitoring information required from institutions by 6 November 2003.

Action required

3. We require:

- final monitoring information on the use of 2001-02 student support funding by 7 November 2002
- interim monitoring return on the use of opportunity bursaries for 2002-03 by 7 November 2002
- final monitoring information on the use of 2002-03 student support funding by 6 November 2003
- Interim monitoring return on the use of opportunity bursaries for 2003-04 by 6 November 2003.

Background

4. The Department for Education and Skills (DfES) has made £92 million available to higher education institutions (HEIs) for student support funding in 2002-03. We allocate the funds on behalf of the DfES.

Main changes to funding for 2002-03

5. There are no significant changes to the overall package of support available in 2002-03. The funding set aside for Access Bursaries for student parents in 2002-03 is slightly less than in 2001-02; this is because there are fewer students likely to be eligible for the lone parents grant and higher Access Bursary. However, funding for Opportunity Bursaries and Fee Waivers for part-time students will increase in 2002-03.

6. As last year, institutions will receive a single allocation to cover the two bursaries for student parents and the Hardship Fund.

Funds available

7. Total student support funds available for 2002-03 are £91,115,500. This amount has been broken down into:

- a combined Hardship and Bursary Fund of £65,880,000
- a Fee Waiver fund of £14,365,000
- an Opportunity Bursary fund of £10,870,500.

8. A total of £2,277,888 will also be available for administrative costs.

9. In addition to the funds to be allocated by the HEFCE, the DfES has allocated £5.4 million to support students on higher education courses studying in further education colleges (FECs); this will be allocated to FECs by the Learning and Skills Council.

10. The data that inform institutions' allocations are not verified until late spring 2002. Therefore, at this stage we can only publish minimum allocations. Institutions are guaranteed to receive the minimum allocations, which represents at least 90 per cent of their 2001-02 Hardship/Bursary Funds allocation. (This does not include any allocation from funds recycled from previous years.) Part 1 shows the minimum allocations from the joint Hardship and

Bursary Fund. In June 2002 we will issue a circular letter to institutions, giving their final allocations and the model used for the calculations.

Opportunity Bursaries

11. There are 7,710 new Opportunity Bursaries available for HEIs in 2002-03, and 6,321 Opportunity Bursaries for continuing students.

Carry forward

12. Institutions are reminded that for 2002-03 they are allowed to carry forward up to 10 per cent of Hardship/Bursary and Fee Waiver Funds, provided they can foresee a use for them in 2003-04.

13. Any unspent Opportunity Bursary funds for 2001-02 may be carried forward into 2002-03. However, unspent Opportunity Bursary funding for 2002-03 cannot be carried forward into 2003-04 and will be 'clawed back' because we may need to reallocate funding as we did in 2001-02.

Fee Waivers

14. The funds for Fee Waivers will be paid in a single instalment in January 2003. Institutions will receive an allocation based on the number of Fee Waivers given in the previous year as indicated in their monitoring return.

Administration costs

15. In the annual operating statements that institutions will submit to us in July 2002, we will ask them to provide information on how administrative funds have been used to enhance student support activity.

16. The contribution to administrative costs for 2002-03 will be paid in one instalment in August 2002.

Payment and viring

17. We will make payments for Hardship and Bursary Funds to institutions in three instalments:

- 60 per cent in August 2002
- 30 per cent in January 2003
- 10 per cent in April 2003.

18. Institutions will receive the funds for the initial allocations of Opportunity Bursaries in August

2002, based on the initial allocations at Part 2. The monitoring return for 2001-02 will include a 2002-03 interim return for Opportunity Bursaries (see Part 5). This will enable us to establish the final number of bursary holders at each institution. The January 2003 instalment of funding will be adjusted to take into account the difference between the initial and final allocations.

19. Institutions are reminded that they can viro funds from the Hardship/Bursary Fund to cover payments for Opportunity Bursaries before the final instalment is made in January 2002, or to cover Fee Waivers if necessary. Institutions can also viro from the Fee Waiver Fund to the Hardship/Bursary Fund as appropriate. This means that effectively the Fee Waiver and Hardship/Bursary Funds may be managed as a single fund.

Monitoring student support funds

2001-02

20. In HEFCE 01/15 'Student support funding for higher education institutions 2001-02', Part 6, we published a sample of the monitoring return for 2001-02. The actual monitoring return for 2001-02 is broadly the same; however there are some amendments to the return, and in particular there have been changes to the Opportunity Bursary 2002-03 interim return.

21. The Opportunity Bursary 2002-03 interim return has been reproduced in Part 5 for illustrative purposes only. We will provide institutions with disks for completion.

22. The timetable for return of monitoring information is as follows:

June 2002	Circular letter with funding allocations sent to institutions, plus guidance notes for completing the disks
August 2002	Disk plus a further copy of the guidance notes sent to institutional contacts
31 October 2002	Census date for the 2002-03 mid-year monitoring return for Opportunity Bursaries
7 November 2002	Deadline for return of completed disks

23. Institutions should notify us as soon as possible before 7 November 2002 if they are not going to be able to return the monitoring information on time.

24. Institutions should be aware that we will examine monitoring returns to verify the data, and may make additional enquiries to clarify the information. If an institution fails to make a return by the due date, we will deduct from the recurrent grant any expenses that we incur in obtaining a return. Any institution failing to make a return for 2001-02 by the due date will also lose entitlement to a share of any unused funds to be recycled.

25. Institutions should note that the final allocations for Opportunity Bursaries and Fee Waivers can only be made after the data from all HEIs have been received, and that delays in submitting therefore affect the whole sector.

2002-03

26. The monitoring return tables for 2002-03 are in Part 6. These forms are for illustration only. The monitoring disk will be issued to institutions in August 2003, with a return date of **6 November 2003**.

Part 1 Minimum allocations of Hardship/Bursary Funds and administrative costs 2002-03

Universities	Minimum allocation of Hardship/Bursary Funds (£)	Minimum allocation of administrative costs (£)
Anglia Polytechnic University	769,196	28,463
Aston University	250,719	8,234
University of Bath	244,699	7,346
Birkbeck College	109,127	7,461
University of Birmingham	811,578	25,423
Bournemouth University	401,260	11,828
University of Bradford	376,116	12,595
University of Brighton	680,101	18,955
University of Bristol	487,106	13,649
Brunel University	582,304	17,120
University of Cambridge	520,228	14,968
University of Central England in Birmingham	784,858	27,175
University of Central Lancashire	1,340,817	39,465
City University	240,323	7,021
Coventry University	579,614	20,194
De Montfort University	1,273,870	40,540
University of Derby	848,665	25,897
University of Durham	500,110	15,314
University of East Anglia	418,600	11,902
University of East London	1,008,257	30,303
University of Essex	231,902	7,260
University of Exeter	432,645	12,997
University of Gloucestershire	401,624	11,790
Goldsmiths College	411,917	12,998
University of Greenwich	915,387	27,775
University of Hertfordshire	852,986	26,429
University of Huddersfield	676,694	22,529
University of Hull	611,660	20,478
Imperial College of Science, Technology and Medicine	381,243	10,919
Keele University	302,258	9,131
University of Kent at Canterbury	374,279	12,735

Universities continued	Minimum allocation of Hardship/Bursary Funds (£)	Minimum allocation of administrative costs (£)
King's College London	585,459	16,777
Kingston University	578,720	17,891
Lancaster University	401,365	12,434
University of Leeds	977,549	31,061
Leeds Metropolitan University	841,028	27,266
University of Leicester	405,812	12,633
University of Lincoln	654,475	20,774
University of Liverpool	581,668	19,735
Liverpool John Moores University	896,769	32,630
London Guildhall University	856,400	26,486
Loughborough University	420,208	13,480
University of Luton	489,776	17,862
University of Manchester	809,710	24,655
University of Manchester Institute of Science & Technology	225,114	7,253
Manchester Metropolitan University	1,449,596	46,698
Middlesex University	1,328,310	44,430
University of Newcastle	528,335	16,455
University of North London	1,092,965	35,416
University of Northumbria at Newcastle	831,344	27,054
University of Nottingham	496,364	16,086
Nottingham Trent University	973,459	30,528
Open University	893,730	264,458
University of Oxford	521,503	15,492
Oxford Brookes University	505,927	14,387
University of Plymouth	1,029,226	31,233
University of Portsmouth	737,052	22,440
Queen Mary, University of London	418,062	12,789
University of Reading	407,730	11,965
Royal Holloway, University of London	213,264	6,407
University of Salford	851,415	27,138
University of Sheffield	859,161	26,107
Sheffield Hallam University	1,195,443	37,738
University of Southampton	627,835	18,798
South Bank University	1,204,655	35,895

Universities continued	Minimum allocation of Hardship/Bursary Funds (£)	Minimum allocation of administrative costs (£)
Staffordshire University	849,623	28,044
University of Sunderland	808,409	28,646
University of Surrey	191,169	6,340
University of Surrey Roehampton	486,789	13,641
University of Sussex	427,392	14,797
University of Teesside	587,052	19,488
Thames Valley University	920,057	25,016
University College London	590,256	17,056
University of Warwick	464,844	13,729
University of West of England, Bristol	930,152	27,953
University of Westminster	880,293	27,465
University of Wolverhampton	1,217,864	39,482
University of York	386,394	11,222

General colleges	Minimum allocation of Hardship/Bursary Funds (£)	Minimum allocation of administrative costs (£)
Bath Spa University College	278,555	8,237
Bolton Institute of Higher Education	483,644	15,597
Buckinghamshire Chilterns University College	320,749	10,042
Canterbury Christ Church University College	386,399	11,168
Chester College of Higher Education	183,858	5,827
University College Chichester	286,695	8,057
Edge Hill College of Higher Education	376,278	11,717
King Alfred's College, Winchester	201,167	5,835
Liverpool Hope	377,159	14,453
University College Northampton	495,684	15,238
St Mary's College	123,377	3,634
Southampton Institute	715,109	20,877
University College Worcester	264,763	7,905
York St John College	198,262	6,050

Specialist colleges	Minimum allocation of Hardship/Bursary Funds (£)	Minimum allocation of administrative costs (£)
Bishop Grosseteste College	52,961	1,774
Arts Institute at Bournemouth	104,985	3,158
Institute of Cancer Research	3,456	86
Central School of Speech and Drama	42,595	1,490
Cranfield University	118,550	3,364
Cumbria College of Art & Design	66,511	2,091
Conservatoire for Dance and Drama	12,865	622
Dartington College of Arts	41,798	1,507
Institute of Education	130,211	3,271
Falmouth College of Arts	99,692	3,188
Harper Adams University College	50,009	1,713
Kent Institute of Art & Design	110,942	4,277
University of London	23,558	914
London Business School	19,143	479
London School of Economics and Political Science	126,041	3,576
London School of Hygiene & Tropical Medicine	15,870	397
The London Institute	795,818	23,911
Newman College	100,499	2,975
Northern School of Contemporary Dance	11,480	712
Norwich School of Art & Design	63,176	2,089
School of Oriental and African Studies	165,163	4,504
School of Pharmacy	25,598	1,102
Ravensbourne College of Design and Communication	49,442	1,699
RCN Institute	23,205	605
Rose Bruford College	32,567	1,152
Royal Academy of Music	39,395	1,447
Royal Agricultural College	16,238	706
Royal College of Art	129,477	3,237
Royal College of Music	36,433	1,323
Royal Northern College of Music	22,734	1,031
Royal Veterinary College	34,409	1,185
St George's Hospital Medical School	66,564	2,102
College of St Mark & St John	242,258	6,585
St Martin's College	396,084	10,814

Specialist colleges continued	Minimum allocation of Hardship/Bursary Funds (£)	Minimum allocation of administrative costs (£)
The Surrey Institute of Art & Design, University College	135,636	4,156
Trinity & All Saints	189,684	5,523
Trinity College of Music	21,627	978
Wimbledon School of Art	39,938	1,417
Writtle College	87,804	2,595
Transferred to the Teacher Training Agency	92,724	2,318
Total	59,978,705	2,114,934

Part 2 Revised initial allocations of new and continuing Opportunity Bursaries 2002-03

Universities	Allocation of new Opportunity Bursaries (£)	Allocation of continuing Opportunity Bursaries (£)
Anglia Polytechnic University	73,000	28,500
Aston University	58,000	20,000
University of Bath	36,000	12,500
Birkbeck College	0	0
University of Birmingham	115,000	45,500
Bournemouth University	46,000	19,000
University of Bradford	71,000	38,000
University of Brighton	55,000	15,000
University of Bristol	43,000	14,000
Brunel University	73,000	29,500
University of Cambridge	57,000	21,500
University of Central England in Birmingham	117,000	47,500
University of Central Lancashire	149,000	67,000
City University	26,000	14,500
Coventry University	132,000	62,500
De Montfort University	179,000	89,000
University of Derby	98,000	45,000
University of Durham	62,000	30,500
University of East Anglia	39,000	8,500
University of East London	86,000	40,000
University of Essex	42,000	16,500
University of Exeter	35,000	10,500
University of Gloucestershire	45,000	12,500
Goldsmiths College	27,000	10,000
University of Greenwich	102,000	50,000
University of Hertfordshire	101,000	46,500
University of Huddersfield	147,000	62,500
University of Hull	86,000	35,500
Imperial College of Science, Technology and Medicine	39,000	16,500
Keele University	43,000	20,000
University of Kent at Canterbury	57,000	11,500
King's College London	66,000	19,000
Kingston University	86,000	33,500

Universities continued	Allocation of new Opportunity Bursaries (£)	Allocation of continuing Opportunity Bursaries (£)
Lancaster University	67,000	29,000
University of Leeds	150,000	52,000
Leeds Metropolitan University	125,000	50,500
University of Leicester	67,000	32,500
University of Lincoln	91,000	45,000
University of Liverpool	117,000	51,500
Liverpool John Moores University	179,000	67,500
London Guildhall University	101,000	41,000
Loughborough University	77,000	39,500
University of Luton	92,000	48,000
University of Manchester	126,000	48,000
University of Manchester Institute of Science & Technology	48,000	17,000
Manchester Metropolitan University	235,000	99,000
Middlesex University	143,000	60,500
University of Newcastle	90,000	33,000
University of North London	101,000	21,500
University of Northumbria at Newcastle	148,000	55,500
University of Nottingham	71,000	30,000
Nottingham Trent University	150,000	71,500
Open University	0	0
University of Oxford	55,000	19,500
Oxford Brookes University	40,000	14,000
University of Plymouth	102,000	39,000
University of Portsmouth	93,000	44,500
Queen Mary, University of London	71,000	22,500
University of Reading	46,000	18,000
Royal Holloway, University of London	29,000	14,000
University of Salford	141,000	57,000
University of Sheffield	105,000	44,000
Sheffield Hallam University	187,000	83,500
University of Southampton	67,000	11,000
South Bank University	90,000	39,000
Staffordshire University	162,000	74,000
University of Sunderland	148,000	63,000

Universities continued	Allocation of new Opportunity Bursaries (£)	Allocation of continuing Opportunity Bursaries (£)
University of Surrey	27,000	10,500
University of Surrey Roehampton	33,000	14,000
University of Sussex	38,000	12,500
University of Teesside	103,000	41,500
Thames Valley University	45,000	22,500
University College London	61,000	28,500
University of Warwick	53,000	19,500
University of West of England, Bristol	98,000	44,500
University of Westminster	92,000	38,500
University of Wolverhampton	184,000	84,000
University of York	46,000	16,500

General colleges	Allocation of new Opportunity Bursaries (£)	Allocation of continuing Opportunity Bursaries (£)
Bath Spa University College	20,000	8,500
Bolton Institute of Higher Education	50,000	15,500
Buckinghamshire Chilterns University College	47,000	19,000
Canterbury Christ Church University College	35,000	11,000
Chester College of Higher Education	34,000	11,500
University College Chichester	15,000	7,500
Edge Hill College of Higher Education	49,000	16,000
King Alfred's College, Winchester	20,000	8,500
Liverpool Hope	54,000	25,500
University College Northampton	77,000	27,500
St Mary's College	14,000	8,000
Southampton Institute	77,000	35,500
University College Worcester	23,000	11,000
York St John College	30,000	12,500

Specialist colleges	Allocation of new Opportunity Bursaries (£)	Allocation of continuing Opportunity Bursaries (£)
Bishop Grosseteste College	12,000	6,000
Arts Institute at Bournemouth	12,000	0
Institute of Cancer Research	0	0
Central School of Speech and Drama	12,000	5,000
Cranfield University	12,000	4,000
Cumbria College of Art & Design	12,000	4,500
Conservatoire for Dance and Drama	12,000	0
Dartington College of Arts	12,000	6,500
Institute of Education	0	0
Falmouth College of Arts	12,000	6,500
Harper Adams University College	12,000	6,500
Kent Institute of Art & Design	20,000	9,000
University of London	12,000	1,000
London Business School	0	0
London School of Economics and Political Science	13,000	4,000
London School of Hygiene & Tropical Medicine	0	0
The London Institute	61,000	23,000
Newman College	12,000	6,500
Northern School of Contemporary Dance	12,000	5,000
Norwich School of Art & Design	12,000	6,500
School of Oriental and African Studies	12,000	3,000
School of Pharmacy	12,000	6,500
Ravensbourne College of Design and Communication	12,000	6,500
RCN Institute	0	1,000
Rose Bruford College	12,000	1,500
Royal Academy of Music	12,000	6,500
Royal Agricultural College	12,000	0
Royal College of Art	0	0
Royal College of Music	12,000	4,500
Royal Northern College of Music	12,000	6,500
Royal Veterinary College	12,000	1,000
St George's Hospital Medical School	12,000	5,500
College of St Mark & St John	12,000	8,500
St Martin's College	22,000	9,500

Specialist colleges continued	Allocation of new Opportunity Bursaries (£)	Allocation of continuing Opportunity Bursaries (£)
The Surrey Institute of Art & Design, University College	19,000	8,500
Trinity & All Saints	21,000	9,000
Trinity College of Music	12,000	5,500
Wimbledon School of Art	12,000	3,500
Writtle College	12,000	1,500
Transferred to the Teacher Training Agency	0	0
Total	7,710,000	3,160,500

Part 3 Access Bursaries and Hardship Fund guidance 2002-03

	Page
Introduction	20
Section 1 Essential information for administrators	22
Section 2 Hardship Fund guidance	26
Section 3 Guidance on Fee Waivers for part-time students	31
Section 4 Financial conditions and auditing requirements	33
Section 5 Frequently asked questions	34
Annex A Definition of registered and accredited childcare	37
Annex B Form of words for students to give their Benefits Office	38
Annex C Residency requirements	39
Appendix A Immigration stamps	44
Appendix B Separate provisions	47
Appendix C 'Ordinarily resident'	51
Appendix D Armed Forces personnel	52
Annex D Dance and drama awards (connected institutions)	53
Annex E Advice on issuing short-term loans from the Hardship Fund	54
Annex F The Foyer scheme	55

Introduction

1. This guidance covers advice for administrators on Access Bursaries, the Hardship Fund and the Fee Waiver scheme for part-time students in 2002-03.

2. Section 1: 'Essential information for administrators' contains new information for 2002-03, and experienced administrators may only want to refer to this. The guidance also includes a section on frequently asked questions, which administrators may find helpful as a first point of reference.

The DfES review of targeted support 2001

3. The support provided through Access Bursaries, Opportunity Bursaries, Fee Waivers and the Hardship Fund plays a key part in helping to deliver the Government's widening access policies, and in particular to provide targeted help for students from low-income backgrounds. Together with several new grants for student parents, and continued help for disabled students, this has led to a significant increase in the funding available to vulnerable students. We recognise that it has also resulted in a complex system that is difficult for students to understand and access, and causes burdens for administrators.

4. The DfES has therefore set up a review, led by Dr Philip Harris from the University of Manchester and involving administrators from both HE institutions and LEAs. The review has looked specifically at ways in which the additional support provided for students with children and others facing financial difficulty can be improved to provide:

- a simpler set of arrangements which is easier to understand and apply for
- more confidence and certainty for students over the financial support available to them
- arrangements which are easier to administer for institutions, LEAs and the Student Loans Company
- clear and consistent eligibility criteria.

5. The DfES will be consulting fully on the proposals coming out of the review and will provide detailed advice on any changes well before they are implemented.

Funding for Access and Hardship Funds in 2002-03

6. The DfES has made no significant changes to the overall package of support available for students in 2002-03. The funding set aside for Access Bursaries for student parents in 2002-03 is slightly less than in 2001-02. This is because there will be fewer students eligible for lone parents grant and the higher £1,000 Access Bursary. Student parents will also be eligible for help with their childcare and other costs through the statutory grants.

7. The Hardship Fund is maintained at the same level as 2001-02. There will be increased funding for Fee Waivers for part-time students and more Opportunity Bursaries in 2002-03. The total amount of funding provided to HE institutions in England in 2002-03 through the Student Support Funds will be £92 million, an increase of 5 per cent over 2001-02.

8. Institutions will again this year receive a single allocation for their Access Bursaries and Hardship Fund. Although we previously told institutions that a breakdown could be provided showing how much is included within an individual allocation for Access Bursaries, HEFCE is not able to provide this, as it does not distinguish between the two budgets when deciding allocations. Spending on these bursaries in 2001-02 should give institutions a guide to the amounts they are likely to need to set aside for this purpose in 2002-03.

Funding for administration costs

9. The Council will again be providing institutions with specific funding to improve the promotion and administration of student support services in institutions. Institutions are encouraged to use some of this funding to ensure that the support available through the Hardship Fund and Access Bursaries is effectively publicised for prospective and existing students. Institutions can use this funding for Student Union advice services if they wish.

Opportunity Bursaries 2002-03

10. Initial allocations of Opportunity Bursaries for those entering higher education in 2002 are included in this guidance at Part 2. Information on eligibility and how to process applications for Opportunity Bursaries is contained within the supplementary guidance, issued as 'Student support funding' (HEFCE Circular Letter 17/01).

Viring

11. Institutions may vire between their Hardship Fund and Fee Waiver budgets if necessary or appropriate to best manage their allocations. However, Opportunity Bursaries funding must be kept separate and no virement from this budget is allowed. If there is unspent Opportunity Bursaries funding available in December 2002, this will be reallocated to institutions in January 2003.

Section 1 **Essential information for administrators**

Changes to previous guidance for 2002-03

Bursaries for Foyer residents

1. The Foyer Federation is a charity that works with the young homeless. The Federation has been trying to raise aspirations amongst those among their residents who have the potential to benefit from higher education.

2. These young people who face real obstacles and receive no financial support from their parents, do not have savings to rely on, have to pay for their own accommodation outside of term time, and some are already in debt as a consequence of past chaotic lifestyles. For the first time this year Foyer students are a priority for help from the Hardship Fund.

3. The Secretary of State expects HEIs to use some funding from within their Hardship Fund allocations to offer bursaries to Foyer students and any other young homeless students they become aware of. The Foyer Federation has reached agreement with a group of charitable trusts that they will provide funding to support mentors for any Foyer students who are accepted into HE (see Annex F). To encourage these students into HE, bursary commitments need to be given to Foyer students as soon as they have accepted Unconditional or Conditional Firm Offers. Bursary commitments should be given for the duration of the course.

4. The bursary will mainly be used to help meet accommodation costs outside of term time, but can also be used for general course and living costs. The amount of bursary is suggested by the Foyer Federation at £1,000 for each year of the course. Additional funding to cover higher accommodation costs will be provided to a Foyer student from charitable sponsorship, which the Foyer Federation is responsible for arranging.

5. The number of Foyer students who have the potential to enter HE is small: up to 100 such students a year in the UK are likely to need a bursary. Any Foyer student applying to study on an HE course will be brought to the institution's attention by the local Foyer. As Foyer students

would almost certainly meet the criteria within institutions for help from the Hardship Fund, giving a bursary should not impact on the ability to help other students. The mentor appointed by the Foyer will continue to support the student during their HE course and will provide a link between the institution and the student if there are any problems.

6. Institutions can also offer a bursary to any postgraduate students from Foyers, and those who have already started a first degree course and may be in their second or third year of the course. Nursing and other students from Foyers who are receiving an NHS Bursary (including those with non-means-tested bursaries) can also apply for a bursary from the Hardship Fund.

7. There will be no need for HEIs to undertake any separate means-testing of Foyer students for the bursary. Their residence within a Foyer will be sufficient evidence to award them this support.

8. As well as the bursary, Foyer students can be given extra financial help through the Hardship Fund if institutions wish to do so; and those applying to an HEI from study at a school or college in an Excellence in Cities (EiC) or Education Action Zone (EAZ) area can also apply for an Opportunity Bursary from that HEI.

9. For more information about the Foyer Federation visit its web-site at www.foyer.net

Changes to student support regulations on upper age limits, young married students and disabled students

10. The upper age limit (50 or 55) for dependants' grants – including childcare grants, school meals grants and travel grants – will be removed from 2002-03. (They will continue however to apply to loans.)

11. From 2002-03 a student will be treated as married from the beginning of the next academic year after they marry, so that no parental contribution will apply, and their spouse may be liable for a contribution instead. This replaces the previous provision that they must have been married for at least two years before a parental contribution ceases to apply.

12. From 2002-03 all disabled students on part-time initial teacher training courses, including distance learning courses, will be able to apply for disabled students' allowances. The previous restriction that they must attend full-time for at least six weeks in an academic year has been removed.

Support for students with dependent children

13. Students with dependent children are eligible to apply for additional targeted support, much of which is non-discretionary. The key elements of their package are:

- a. An additional £255 in the dependants' grant for the first child.
- b. A grant for travel and books/equipment of £510.
- c. A childcare grant for students using registered or accredited childcare (see below).
- d. Transitional arrangements for existing lone parent students who may choose to retain the lone parents grant or to apply for the childcare grant.
- e. Bursaries through the Access Fund for both new and existing students. Students with children who are eligible for a dependants' grant and who are not entitled to the lone parents grant will be able to apply for an additional bursary of up to £500, depending on need. Existing students who decide to retain the lone parents grant can apply for a bursary of up to £1,000.

Childcare grant

14. For full-time students with dependant children in registered or accredited childcare.

15. A student will not be eligible for the childcare grant if they are in receipt of the lone parents grant. The amount of childcare grant payable may be reduced by the means-test.

For one child

16. The childcare grant will pay up to £114.75 a week (85 per cent of actual costs of up to £135 a week) during term time and short vacations, and up

to £94.50 a week (70 per cent of actual costs of up to £135 per week) during the long vacation.

For two or more children

17. The grant will pay up to £170 a week (85 per cent of actual costs of up to £200 a week) during term time and short vacations and up to £140 a week (70 per cent of actual costs of up to £200 per week) during the long vacation.

18. A definition of accredited or registered childcare is at Annex A.

19. The childcare grant, the extra dependants' grant of £255 and the travel, books and equipment grant are fully disregarded by the Department for Work and Pensions (DWP) define for benefits purposes, in addition to the disregard already applicable for the student loan. Bursaries are also disregarded if they are given to meet course-related costs.

20. The childcare grant and the new travel, books and equipment grant will be administered through local education authorities (LEAs) and paid to students by the Students Loan Company.

Bursaries through the Access Fund for both new and continuing students

Access Bursaries in 2002-03

21. There will be four categories for support from Access Bursaries in 2002-03:

- continuing students in their second or any further year who received a bursary in 2001-02
- new students with dependent children
- Opportunity Bursaries for young disadvantaged students
- bursaries for students not receiving any of the above.

Bursaries for continuing students in their second or any further year who received a bursary in 2001-02

22. Continuing students in their second or any further year who received a bursary in 2001-02 should be considered for a bursary in 2002-03. Unless their circumstances have changed, continuing

students who received one of these bursaries should be awarded the same level of support that they received in 2001-02: up to £1,000 if they are receiving lone parents grant, or up to £500 if they are entitled to the new childcare package.

23. Where institutions used some of their Hardship Fund allocation to provide bursaries of more than £1,000 or £500 in 2001-02, they can do so again in 2002-03. Institutions should advise continuing students to apply through their LEA to determine whether they can apply for the childcare grant or whether they should continue to receive the lone parents grant.

Access Bursaries for new students with dependent children

24. Arrangements for new students in 2002-03 are the same as in 2001-02. Access Bursaries of up to £500 are available for students with children and who are eligible for dependants' grant or childcare grant, or both. Institutions have discretion to give a higher bursary if they judge this is appropriate, and to judge students' individual needs in deciding how much bursary to give.

25. These bursaries are intended to meet childcare where the childcare grant does not cover all such costs; and specific child-related or course-related costs. For example, some student parents will use informal childcare, and will not qualify for the childcare grant. Others will have little or no childcare costs – for example, if their children are older – but have other child-related or course-related expenses. Others may receive substantial help from the childcare grant, but need further help to meet all their childcare costs. The bursaries can also be used to pay for course-related costs, such as books or travel not met by the books/equipment or travel grants, or for educational expenses for their children, such as school uniform, sports kit or equipment, or school trips. They may also be used for other child-related expenses if provided as a single payment.

Payment of Access Bursaries

26. Institutions are encouraged to offer students an Access Bursary before they start the course, or, in the case of continuing students, before the start of

the next academic year. In cases where there is doubt over whether a student is retaining lone parents grant, institutions may wish to consider offering a bursary of £500 with the balance to be paid once it is clear that the student is not applying for the childcare grant. As far as possible, institutions should encourage students to provide an estimate of how much childcare they are likely to need, and to give students information in advance about the attendance requirements for their particular course, to avoid delays in LEA assessments for the childcare grant.

27. Institutions are, of course, able to provide additional help from the Hardship Fund to meet a student's childcare costs, if the amount they receive from the childcare and other grants and the Access Bursary is not sufficient to cover these.

Other bursaries

28. In addition to the two categories of bursary explained above, institutions continue to have discretion to award other bursaries. There is no longer a limit on the amount that institutions can spend on these additional bursaries. Institutions might consider using this flexibility to offer bursaries to students from disadvantaged backgrounds who are not eligible for an Opportunity Bursary, or students with dependent children who do not receive dependants' or childcare grant because they are not wholly or mainly responsible for a child but still have child-related costs.

29. Where institutions are awarding bursaries from their Hardship Fund to students who do not qualify for an Opportunity Bursary or an access bursary as a student parent, the students will be required to take out their full entitlement of student loan before the bursary can be paid.

Funding for consortia arrangements

30. There has been some confusion over responsibility for Access and Hardship Funds for students who are covered by HEFCE-recognised funding consortia arrangements. The arrangements remain the same in 2002-03 as previous years.

Institutions involved in HEFCE-recognised funding consortia may find the following clarification helpful.

31. A consortium recognised by HEFCE for funding purposes enables HEFCE grant to be distributed to a group of institutions through a single lead institution. In a consortium, the students remain attached to the individual institutions that are members of the consortium. However, the HEFCE grant flows through a lead institution that takes responsibility for co-ordinating and accounting for the allocation and use of funds. It is for members of the consortium to agree who should lead. The institution or body that makes awards and validates the relevant HE programmes (which may or may not also be a member of the consortium) retains responsibility for the academic standards of the awards made in its name.

32. For students in a recognised consortium, allocations of Access and Hardship Funds will be made to the individual institution where the student is attending the course and not to the lead institution. This is different to the arrangements for franchised students, who are counted within the allocations to the franchising institution.

Foundation degrees

33. In some cases students on foundation degrees will be studying at two institutions as part of their course. Where this happens, it is the institution responsible for returning student data to HESA that is responsible for counting those students and for providing Access and Hardship Fund support. HEFCE has issued advice on this, ('HESES01', HEFCE 01/52, Annex B). In future years, allocations for Access and Hardship Funds will reflect these student numbers. Where institutions are 'sharing' students on foundation degree courses, they are asked to ensure that they understand which institution should take responsibility for counting students and for accepting applications for Access and Hardship Funds. The DfES expects the arrangements put in place to be as helpful as possible to the students affected.

Eligibility for Fee Waivers for students with a low income

34. In addition to students on the specified benefits and tax credit recipients, students whose net income after national insurance and tax deductions is at broadly the same level as tax credit recipients – that is, £11,543 – can be considered for a Fee Waiver and are not required to be in receipt of tax credits or any qualifying benefits.

FE students studying in HEIs

35. Although the guidance here is intended to apply to all students studying at HE institutions, including further education (FE) students, we have been made aware that part-time FE students are being disadvantaged by the HE rules. The guidance on Learner Support Funds for FE students does not restrict support for part-time students to those studying 50 per cent or more of a full-time course. The DfES's policy for HE students is that they should receive the same support, regardless of whether they are studying at an HE or FE institution. The same policy should also apply to FE students.

36. All part-time FE students should therefore be able to apply for help from the HE Hardship Fund, and should not have to be studying on a 50 per cent or more FTE course to qualify.

Section 2 Hardship Fund guidance

Purpose and scope

Purpose

1. The Hardship Fund provides financial help to students who face difficulty in meeting their living costs or course costs, whether as a result of their personal circumstances (for example, student parents or disabled students) or because they fall into hardship unexpectedly. The fund cannot be used to meet the cost of tuition fees for any full-time students.

Eligibility

2. Institutions can use the Hardship Fund to help home students in one of the following categories:

- undergraduate students, either full- or part-time including distance learners, following a higher education course including sandwich courses and any periods of placement and foundation degrees
- postgraduate students, either full- or part-time, following a course of higher education at a level above first degree, including those who are writing up their thesis and not therefore attending the institution
- further education students, either full- or part-time, who are aged 16 or over and are following a course of further education, including sandwich courses and any periods of placement.

3. A home student is defined as one who meets certain conditions that also apply to eligibility for a student loan. Full details on eligibility and residency rules are at Annex C.

Part-time students

4. To qualify for help, a part-time student must be studying at least 50 per cent of a full-time course. An exception to this limit can be made in the case of disabled students whose disability prevents them from studying at least 50 per cent of a full-time course. These students are not eligible for a Disabled Students Allowance (DSA) and may need additional support. These students must be studying for at least 25 per cent of a full-time course to be eligible for a payment from the Hardship Fund.

5. When deciding whether a course is 50 per cent full-time equivalent (FTE) or not, institutions should consider how long it would take to achieve the relevant qualification if the course were taken full-time. The calculation used should be the same as that used to calculate the FTE for the annual statistical return for HESA. If the part-time course would take more than twice as long to complete as a full-time course, it is unlikely that a student on that course would qualify for a Fee Waiver. It can be difficult to assess this 50 per cent rule where no full-time equivalent course exists. In these cases, institutions may find it useful to compare the length of study to a more measurable course, perhaps in another institution if appropriate.

Support for HE students at further education colleges

6. Support from Access Bursaries, the Hardship Fund and the Fee Waiver scheme for HE students on franchised courses, or who are on a course provided jointly by an HEI and a further education institution, are the responsibility of the parent HEI, but support for other HE students at FE colleges (including those in HEFCE-recognised consortia) are the responsibility of the FE college. Student support funding is now provided directly to FE colleges for these HE students. A total of £5.4 million will be available for HE student support for FE colleges in 2002-03.

Eligibility of students from Wales, Northern Ireland and Scotland

7. Students from Wales, Northern Ireland or Scotland are eligible to apply for bursaries or for help from the Hardship Fund. Institutions should take into account any support the student is receiving from their country of domicile. Statutory support in Scotland differs from that in the rest of the UK. Where institutions have a query about the support a Scottish student is receiving, or entitled to receive, they are advised to ring the Student Awards Agency for Scotland helpline on 0131 476 8212.

Priority for help from the Hardship Fund

8. Student parents, especially lone parents, remain a priority for support. Institutions should ensure that in setting aside funding for Access Bursaries, they are also able to meet the needs of other vulnerable students from the Hardship Fund. Students who began their courses in 2000-01 or earlier may need more help than those on courses from 2001-02 onwards. Other priorities should be:

- Foyer residents and other homeless students
- mature students with other financial commitments
- disabled students
- final year students
- care leavers over 18.

NHS bursary holders

9. Students who receive a non-means-tested NHS bursary are not eligible for help from the Hardship Fund. Students who receive a means-tested NHS bursary are eligible to apply for help from the Hardship Fund. NHS students in this category are not, however, eligible for lone parents grant, dependants' grant or the childcare grant, and cannot apply for an Access Bursary.

Help with the costs of diagnostic tests for disabled students

10. Disabled students, especially those with dyslexia, may have difficulty meeting the cost of the diagnostic test which they need to undertake when applying for a Disabled Students Allowance. The cost cannot be provided by the DSA, even retrospectively, for legal reasons. Assistance in meeting the cost of the test, and associated costs such as travel to and from the assessment centre, may be provided through the Hardship Fund. It is not necessary for students to have applied for a Hardship Loan before receiving help to pay for a diagnostic test.

Teacher trainees, including those on flexible PGCE courses

11. Students on initial teacher training courses must have applied for help from the Secondary Shortage Subject Scheme, if eligible, before applying

for the Hardship Fund. Postgraduate (PGCE) trainees eligible for the training salaries announced on 30 March 2000 should expect to have these taken into account when making an application for help from the Access and Hardship Fund (including bursaries). There may, exceptionally, be a few students on flexible PGCE courses who are in financial hardship. They are eligible to apply for the Hardship Fund and, where the student is also eligible for student support, an Access Bursary. Institutions should take into account any other income the student receives, such as their training salary or a student loan, and must ensure that their support from the fund only covers the period that the student is on the course.

Dance and drama award students

12. Students in receipt of a dance and drama award for a higher education course, and who meet the residency requirements, are eligible for the Access and Hardship Fund, via their connected higher education institution. Their numbers have been taken into account in allocating funding to the connected institution. Institutions should ensure that dance and drama award students are aware of the Access and Hardship Fund and know where to apply for help. A list of providers and connected institutions is at Annex D.

Treatment of student loans

Full-time students

Main student loan

13. A full-time student must have taken out a student loan, if eligible, and applied for the full amount to which they are entitled, before receiving help from the Hardship Fund. The only exception to this rule is where institutions make emergency payments to students at the beginning of term. Students can be asked to show their financial support notification and payment schedule from the Student Loans Company as evidence that they have taken out their maximum assessed entitlement. If the assessment is provisional, institutions may wish to check the revised notification before making further payments from the Hardship Fund. However this does not mean that HEIs should refuse to help 'provisional' students who have not

received a revised notification since they were first offered help. Student parents (and Foyer students) can be given an Access Bursary without having to take out their full student loan entitlement, but should not receive further help from the Hardship Fund until they have done so.

Hardship loan

14. Students with dependants, mature students aged over 25, disabled students and students who enter HE with pre-existing debts, are not required to take out a hardship loan before receiving help from the Hardship Fund. The DfES recommends that institutions meet the needs of these groups of students through the Hardship Fund wherever possible, leaving the hardship loan budget available in the main for other students.

15. Institutions may wish to refer to the hardship loan guidance for 2001-02, which was issued in June 2000, for further advice. Copies are available from the DfES, please refer to the contact list at the beginning of this document.

Part-time students

16. Part-time students who are eligible for a loan but have chosen not to apply for one, should not receive help from the Hardship Fund. Where part-time students have applied, or are intending to apply for their loan during the first term, they may be given help from the Hardship Fund, but any subsequent payments or instalments of payments should only be made after the student has confirmed their application or received their loan. Institutions may wish to bear in mind that the timetable of payment for part-time loans may be brought forward in 2002-03. In effect this will mean students should be able to apply for and receive their loan during the first term. Institutions should take into account the £500 they expect to receive from the loan when assessing the students' income. Part-time students who are not eligible for the part-time loan may still apply to the Hardship Fund, although institutions will want to look carefully at their need, given that their income is too high to receive a loan.

Students on benefit in the second and subsequent year of their course

17. First year students who have not yet registered with their institution will still be able to claim any income-related benefit to which they are entitled until they commence their course.

18. For continuing students, however, the DWP takes the student loan into account from the first benefit week in September to the last benefit week in June inclusive. These students may find themselves with insufficient support during the period from when their benefit stops until they receive their loan cheque, and may need help from the Hardship Fund. Institutions may wish to set aside funds which they can carry forward into the new academic year in order to ensure they have sufficient resources to help these and other students who may need help during the summer vacation period. Institutions should note that students on benefit will not have their benefit payment reduced during the long vacation, because their student loan will already have been treated as income over the 'period payable'.

Short-term loans to students who have not received their loan cheques

19. We expect there to be very few students who will not have received their loan cheque at the start of the academic year, but there may be some who make a late decision to enter higher education, and who therefore do not apply for support in time to receive their cheque early in the term. Where students in this position are going to be in hardship, the Secretary of State asks institutions to help them with a payment from the Hardship Fund. This should be in the form of a short-term loan. Institutions only need to help with students' immediate needs over a few days or weeks, and only if the student has no other resources, such as parental support or summer job savings. Institutions should make every effort to recover these loans, unless they have been converted to a grant payment because of the student's general circumstances. More detailed guidance is at Annex E.

Sick students and other students who are unable to attend their course

20. Students may still receive help from the Access and Hardship Funds if they have stopped attending their course in certain circumstances.

Full-time undergraduates

21. In the case of full-time undergraduates, the Student Support Regulations allow for an automatic disregard of absence for 60 days, if the student is ill. A student is entitled to receive any instalment of student loan and other allowances during this period. Where a student is not attending for other reasons, such as bereavement or illness, continuation of loan instalments and other allowances is at the discretion of the LEA. Institutions may make payments from the Access and Hardship Fund during this period where the LEA continues to support the student. If the HEI has notified the LEA that the student has withdrawn from the course, and the LEA ceases to support the student, institutions should not make payments from the Access and Hardship Fund.

22. At the end of the 60 days, LEAs have discretion to continue to support students. Institutions also have discretion to provide help through the Access and Hardship Fund in these circumstances, provided they are satisfied that a student has not abandoned, withdrawn from or been expelled from the course and that the student intends to return to the course. They should take into account any financial support the student is receiving.

Other students

23. Institutions have discretion to make payments to other students from the Access and Hardship Fund if they are not attending their course for reason of illness, caring responsibility or some other reason. The institution must be satisfied that the student has not abandoned, withdrawn from or been expelled from the course, and that the student is intending to return to the course. Institutions should take into account any benefit or other financial support which the student is receiving.

24. Students who are absent from the course because of illness or caring duties and who cannot return to study until the following academic year

will be eligible for Jobseeker's Allowance for the period after their caring duties end or they recover from their illness until the first day of the next academic year. However, they may still not be able to return to the course until after the academic year has started. Institutions have discretion to help such students from the Hardship Fund during any continuing absence as long as they are satisfied that the student is intending to return to the course during the academic year.

When and how payments from the Hardship Fund should be made

25. Payments from the Hardship Fund, like bursaries, can be agreed in principle prior to the start of the academic year. This is particularly helpful for financially vulnerable students, such as those on low incomes with children. Payment cannot be made until the student has started the course. The Hardship Fund should not normally be used to make very small payments; we recommend a minimum level of £100. Very large payments reduce the money available to other students. We recommend a maximum payment to a student from the Hardship Fund of £3,500, except in cases where a student has been awarded an Access Bursary of £1,000 or is in the first year of an Opportunity Bursary, where we recommend a maximum award from the combined funds of £4,500 per year. Payments can be made directly to a student, or to a third party with the student's permission. Help can also be given indirectly through the provision of items (for example, a PC) or through a short-term loan.

How payments from the Hardship Fund will be treated by the Department for Work and Pensions

26. Any payment from the Hardship Fund which is for course-related costs, such as childcare will be disregarded by the DWP for benefits purposes. This includes Access Bursaries provided they are not for general living costs. Any payment which is a 'one-off', such as paying an electricity bill, will be disregarded provided the student's capital holding does not exceed £3,000. Where Hardship Fund payments are for everyday living costs such as rent,

food, utilities or clothing, and are not paid as a 'one-off', they will be taken into account for benefits purposes with a £20 a week disregard. This £20 disregard will include the £10 a week disregard of the student loan if applicable. It will help students who have received a payment from the Hardship Fund in claiming benefits if they are given a document to present to their local Benefits Agency. The suggested form of words is at Annex B.

Section 3 **Guidance on Fee Waivers for part-time students**

Introduction

1. The eligibility criteria for the Fee Waiver scheme in 2002-03 are broadly the same as in 2001-02. The additional criteria, circulated as part of HEFCE Circular Letter 17/01 in October 2001, have been incorporated.

Eligibility

2. Home or EU students (see Annex A for a definition of a home student) undertaking a part-time undergraduate course which is equivalent to at least 50 per cent of a full-time course are eligible for Fee Waivers, depending on their circumstances. An EU student is one who is a national of a member State of the European Community or a child of such a person who has been ordinarily resident in the EEA throughout the three-year period preceding the first day of their course, excluding any periods wholly or mainly for the purpose of receiving full-time education.

3. When deciding whether a course is 50 per cent FTE or not, institutions should consider how long it would take to achieve the relevant qualification if the course were taken full-time. The calculation used should be the same as that used to calculate the FTE for the annual statistical return for HESA. If the part-time course would take more than twice as long to complete as a full-time course, it is unlikely that a student on that course would qualify for a Fee Waiver. It can be difficult to assess this 50 per cent rule where no full-time equivalent course exists. In these cases, institutions may find it useful to compare the length of study to a more measurable course, perhaps in another institution if appropriate.

Previous study

4. Students are not eligible for a Fee Waiver if they already have a degree qualification, except where they have lost their job since starting their course. Where students have undertaken higher education study, but did not complete their degree (or other qualification), they are still eligible. Students who have a sub-degree HE qualification which they want to top up to degree level are also eligible.

Special cases for students with a degree qualification

5. Some students who wish to study part-time may have obtained their degree qualification straight from school and may have been in employment since then, or have taken time out to raise a family. Where a significant period has elapsed since the student obtained their degree and they wish to undertake a part-time course to upgrade their qualifications and/or skills to re-enter the labour market, or to make a career change, institutions have discretion to grant a Fee Waiver providing the student can show that they intend to use the new qualification/skill to take up employment after they complete their course.

6. Institutions who wish to help part-time students in this position must be able to absorb the cost within their Fee Waiver allocation, although they can vire resources from the Hardship Fund if this is not sufficient.

Fee Waivers for unemployed students who wish to undertake a taster module

7. In response to representations from the sector, and as an incentive to encourage unemployed people who may be thinking of taking a part-time course but who are reluctant to commit to a 50 per cent course, institutions can undertake to refund (or agree to defer) collection of any fees for a single 'taster' module from the Fee Waiver scheme. This is provided the student subsequently enrolls on a part-time course which links to the 'taster' module, making the total up to at least 50 per cent of a full-time course equivalent. If the student does not subsequently enrol on at least a 50 per cent course, they should not have the fee for the 'taster' module met from the Fee Waiver scheme.

NHS bursary holders

8. Part-time students with both means-tested and non-means-tested NHS bursaries have their fees paid by the NHS, and therefore do not qualify for a DfES Fee Waiver.

Students who lose their job

9. Any students who have been in employment of at least 20 hours a week for at least six months, and who lose their job through no fault of their own after starting their course, can have their fees waived. If they regain employment later in the academic year, they will not have to pay any fees until the start of the next academic year (depending on their circumstances). A student is eligible for consideration at any stage during the academic year in which the student loses their job.

Students on benefits or low incomes

10. A student in receipt of any of the following benefits is eligible for a Fee Waiver:

- Housing Benefit
- Income Support
- Council Tax Benefit
- Income-related Job Seeker's Allowance (JSA)
- Working Families' Tax Credit / Disabled Person's Tax Credit.

11. A few students may be on the New Deal allowance. These students do not receive JSA, but part of their allowance includes Income Support, and they are therefore eligible for a Fee Waiver.

12. Tax credit recipients on low incomes are eligible for a Fee Waiver. The income threshold is the same as that for free prescriptions, i.e. a net income of less than £11,543. Tax credit recipients whose income is below the threshold will have received an award notice certifying that they are eligible for free prescriptions. These students are eligible for a Fee Waiver. Those whose income is above that threshold will not be eligible.

13. From September 2002, other students with a net income of less than £11,543 are also eligible – see Section 1 'Essential information for administrators' paragraph 33 for further details.

Students who receive disability benefits

14. Where a student receives Incapacity Benefit, Severe Disablement Allowance or Disability Living Allowance, and their sole income is from welfare benefits, they are eligible for a Fee Waiver. These disability benefits are not means-tested, but students

who receive them may still be on a low income, and may not receive Income Support or other means-tested benefits. Fee Waivers should not be given to students who have income from sources other than welfare benefits if that income is above the threshold.

Part-time loans

15. Eligibility for the Fee Waiver does not depend on the student taking out their £500 loan. Note however that part-time students who are eligible for a loan, but choose not to apply, are not eligible for help from the Hardship Fund (see Part 3, Section 2 Hardship Fund Guidance, paragraph 16 for details).

Assessing students for the Fee Waiver

16. Institutions should assess students for Fee Waivers. LEAs will assess applications for part-time loans separately. HEIs will not need to undertake complicated means-testing. The student's local Benefits Agency office or LEA should be able to provide proof of receipt of benefits.

Section 4 Financial conditions and auditing requirements

1. Institutions must observe the following:
 - a. The funds must only be used for the purposes specified in this guidance.
 - b. The funds must only be made available to eligible students as specified in this guidance.
 - c. Any interest gained on the fund must be:
 - i. Paid to students as part of the normal allocation of the resources available.
 - ii. Used to pay for the training of staff in the administration of the funds or in advising students on money matters (finance or debt counselling) or **additional** staffing costs. Institutions may find it helpful to refer to the recently published good practice checklist on the management of student support funds. This guidance can be found at: www.hefce.ac.uk under 'Learning and teaching/Student support/Good practice checklist'
 - iii. Used to defray audit costs.
 - iv. Used for publicising the funds.
2. Each institution's external auditors are required to certify that **all** student support funds (including funds for Fee Waivers for part-time students) and any interest earned on them, have been applied in accordance with the terms and conditions of the grant and this guidance. This can be done by accounting for both funds within the main audited accounts which institutions send to the HEFCE by 31 December each year. The funds should be treated as a balance sheet item, not as income. Institutions must show in the note to their audited accounts how the funds were used in the previous academic year, giving receipts, payments and closing balance. Institutions must identify in their monitoring returns any interest accrued on the balance of these funds.

Section 5 Frequently asked questions

Access Bursaries of up to £500 & up to £1,000

How do I decide whether a student is eligible for a bursary of £500 or £1,000?

Access Bursaries of up to £500.

The letter from the LEA should provide the necessary information. To be eligible, a student must be in receipt of £1 or more of childcare grant or dependants' grant after means-testing and should not be in receipt of lone parents grant. If the student with child dependants is a new student, or received an Access Bursary of up to £500 in 2001-02, then this will normally be the maximum amount of Access Bursary they can be awarded during this and future years of study (unless institutions use their discretion to award more on an individual basis).

Access Bursaries of up to £1,000.

As above, the letter from the LEA should provide the necessary information. If the student is a continuing student in receipt of the lone parents grant or has been receiving a bursary in previous years on the basis of receiving a mature student bursary in 2000-01, they may be considered for an Access Bursary of up to £1,000.

Note: As many continuing students will receive Access Bursaries of up to £500 in their second year, to retain the term 'Continuing Bursaries' will cause confusion, hence the redefined terminology.

Are the Bursaries only for mature students?

No. Age is not a consideration – it is whether the student has dependent children that matters.

Can a student receive an Access Bursary of up to £500 if they are also receiving the childcare grant?

Yes, if they are eligible.

These limits on Access Bursaries. Can't we give more?

Institutions have discretion to give a higher bursary if they judge this is appropriate. Institutions can also provide additional help from the Hardship Fund to help meet a student's childcare costs.

Must a student receive the childcare grant in order to have an Access Bursary of up to £500?

No. The student must be in receipt of a dependants' allowance, and must not be in receipt of the lone parents grant. Students with informal childcare, for example, will not be able to receive the childcare grant, but may be eligible for the other elements of the new package including the Access Bursary.

What happens if we gave a bursary to a student and the LEA re-assesses the student and decides that they are ineligible for the dependants' or childcare grant?

Institutions will not be required to recover or make good Access Bursaries in this situation. Payment of the bursary will have been subject to the institution's discretion, which is in addition to the assessment made by the LEA. Also the student will be a parent, which is a priority group for assistance. However, the bursary should be taken into consideration when assessing a student for a further payment from the Hardship Fund.

Are NHS students eligible for either £500 or £1,000 Access Bursaries?

Normally no. To be eligible, a student must be in receipt of the childcare grant or dependants' grant for a £500 bursary, or the lone parents grant for a £1,000 bursary. Although there are NHS equivalent grants, this would not make NHS students eligible for Access Bursaries. An exception has been made for those students who received mature student bursaries in 2000-01 (NHS means-tested bursary recipients were eligible) who are not in receipt of childcare grant, dependants' grant or lone parents grant and who, in the interests of receiving continuity of student support, may continue to apply for Access Bursaries of up to £1,000.

Can new students have Access Bursaries of up to £1,000?

No. These bursaries are only available to continuing students under the transitional arrangements or as described in an earlier FAQ.

Foyer bursaries

How will the roles of the mentor/local Foyer work?

Further guidance is available at Annex E.

Hardship Funds

Are NHS students eligible for the Hardship Fund?

Yes, if they are eligible for a means-tested NHS bursary. If they receive a non-means-tested NHS Bursary, they are not eligible for the Hardship Fund.

Can a student have help from the Hardship Fund even if they have already had an Opportunity Bursary?

Yes, if the institution considers that they need additional financial support.

Can the Hardship Fund be used to pay arrears on student loans, where the student has defaulted?

No. However, if a student is in hardship as a result of not being able to receive a student loan, that student would be able to apply for help in meeting their living costs.

What should the Hardship Fund not be used for?

The Hardship Fund should not be used to help students meet their tuition fees. Neither should it be used to make adaptations to buildings, or to meet staff salaries or any cost of administering or publicising the funds; a separate allocation has been given specifically for this.

Can students apply more than once during an academic year for help from the Hardship Fund?

Yes. Students' circumstances can change in the course of the a year, and there should not be any set

limit on the number of times a student can apply for help from the fund.

Some Muslim students will not take out a loan because they believe it is against their religion. Are they eligible for the Hardship Fund?

Students must take out their student loan, if they are eligible for one, in order to be eligible for the Hardship Fund. Institutions may find it helpful to explain that the interest rate attached to student loans merely repays the loan in real terms, and is tied, by primary legislation, to the rate of inflation. It is not interest in the commercial sense of the word, and no profit is made from the interest paid by borrowers.

Can the Hardship Fund be used to pay for communal activities such as a minibus to transport disabled students?

No. The Hardship Fund cannot be used to pay for capital expenditure over £2,500 and should only be used in accordance with the conditions set out in Section 3.

To what level do students need to be in 'hardship' to be considered eligible for help with the cost of diagnostic tests?

It is not necessary to apply assessment criteria quite as stringently as for a standard application for help through the Hardship Fund. A student would not need to be 'in hardship' in a strict sense but they should be in need of financial help to pay for the cost of the tests.

Hardship loans

Are Foyer students to be treated the same way as students under 25?

Foyer students should be treated in the same way as students under 25, namely if they are in receipt of benefits, have a disability or have pre-existing debts then they should be entitled to go straight to the Hardship Fund.

Reviews

There are two reviews currently being undertaken. What are these about?

Main student funding review (led by the Secretary of State)

The student funding review was set up specifically to look at the concerns which have emerged about the current system of student support, in particular the way contributions are balanced between students, their parents and the state. Although student numbers have risen since the reforms were introduced, the proportion of people from low-income backgrounds applying to university has remained static.

Simplification targeted support review (led by officials at the DfES)

This review will run in parallel with the main student funding review above. The aim will be to ensure that the targeted support for vulnerable students is effective in meeting the Government's objectives for increasing participation, widening access and promoting lifelong learning. The review reported to Ministers at the end of February 2002.

Will recommendations from the Simplification review be implemented in 2002-03?

Following the Simplification review there are likely to be changes to the loan application process for part-time students in 2002-03 (refer to section 2 'Hardship fund guidance', paragraph 16). No decisions have been taken about the timing of any other changes. The DfES is consulting fully on the proposals and will provide further advice on any changes well before they are implemented.

Fee Waivers

Who is eligible to apply for a Fee Waiver?

In addition to students on the specified benefits and tax credit recipients, students whose net income after national insurance and tax deductions is at broadly the same level as tax credit recipients – that is, £11,543 – can be considered for a Fee Waiver.

How will I know whether the course my institution is providing is classified as higher education and therefore appropriate to consider a Fee Waiver?

Many part-time courses are 'cut down' versions of full-time HE courses, and this should not present a problem. Where it is not apparent whether a course is HE it is for the institution to decide. Unlike full-time courses, there are no registers or definitive lists of eligible part-time courses.

With the recent inclusion of a non-benefit-related earnings threshold for eligibility for a Fee Waiver, should I include a partner's income when assessing this?

We are currently considering whether to issue clearer guidelines on how students should be assessed for support from the Access and Hardship Funds as part of the review of targeted support. The guidance for 2003-04 will incorporate any recommendations from the review on this issue. In the meantime this will be for the institution to decide. Institutions may find it helpful to consider the spirit in which Fee Waivers were introduced. It would not seem appropriate to grant a Fee Waiver to a student whose income was below the threshold level but whose partner's earnings were particularly high. Conversely, if a student and their partner's combined earnings are assessed as being a little over the threshold, institutions may still wish to award a Fee Waiver.

Annex A **Definition of registered and accredited childcare**

Day care centres that cater for children under the age of 8 and which operate for two hours or more per day for more than five days per year are required to register with and be inspected annually under the Children Act 1989. In 2001 the new Early Years Directorate at OFSTED took over responsibility for registration and inspection from local authorities. Students can find a list of all registered day care providers through their local **Children's Information Service** or on the web-site www.childcarelink.gov.uk. Detail of inspection reports can be accessed on www.ofsted.gov.uk. The Children Act only covers children under the age of 8; day care providers which only provide for children aged 8 and above are not required to register but can join a voluntary accreditation scheme.

At the time of publication, three organisations' quality assurance schemes have been accredited. These are Kids Club Network, Northumberland Out of School Initiative and Somerset and Torbay Early Years and Childcare Team.

The following are types of day care which require registration:

Day nurseries: these look after under 5s for the length of the adult working day. They may be run by social services departments, voluntary organisations, community groups, private companies, employers or individuals, or a combination of any of these on a partnership basis.

Crèches: these are similar to day nurseries.

Playgroups/Pre-schools: these usually provide education and care for children aged 3-6, although some take children aged 2 and a half. Sessions last no longer than 4 hours.

Extended day playgroups: these provide for children for more than 4 hours a day.

Private nursery schools: these deal almost exclusively with children under 5, and differ from a private day nursery in a number of respects, for example children are under the oversight of a qualified teacher.

Out of school clubs: these care for school age children in the absence of their parents or carers

from the end of the school day until the parent can collect the child, or sometimes before school starts. They are not open access.

Open Access Schemes and Adventure Playgrounds: these provide open access facilities for children of all ages but are normally attended by children of school age. There is some supervision. They are open all day in the holidays and at half term.

Registered childminders: these look after children under 5 (and school aged children outside school hours and during the holidays) in domestic premises. Parents and childminders negotiate the terms and conditions.

Early Excellence Centres: this is a unique pilot programme which offers integrated early education from 0-5 years old, childcare, health and family services for children and families.

Further information about childcare can be obtained from your local authority or from www.childcarelink.gov.uk

Annex B **Form of words for students to give their Benefits Office**

[Name of student] has received a payment of
[£ amount] from the Hardship Fund/Access Bursary
Fund provided by the Government.

Delete as appropriate:

- a. It is a single payment.
- b. It is part of a series of [number] payments which
will be made during the period [enter period].
- c. The payment is a short-term loan, which is
repayable when the student receives the first
instalment of the student loan.

To the best of my knowledge the student has not
applied for this payment to meet everyday living
costs.

(Signed)

on behalf of [stamp or other identification of
institution]

Annex C Residency requirements

Normal eligibility criteria for Hardship Fund support

1. Schedule 1 of the Education (Student Support) Regulations 2002/195 sets out the residence conditions for Hardship Fund support in terms of ordinary residence and settled status.

2. To be personally eligible the student must normally be able to satisfy three requirements relating to his/her residence and immigration status on the first day of the first academic year of his/her course. On that date he/she must:

- have been ordinarily resident in the United Kingdom and Islands throughout the three-year period preceding that date other than wholly or mainly for the purpose of receiving full-time education
- be ordinarily resident in England and Wales
- be settled in the United Kingdom under the terms of the Immigration Act 1971, in other words ordinarily resident here without being subject to any restriction on the period for which he may stay.

Exceptions

3. There are exceptions to the settled status requirement. These are as follows:

- refugees, their spouses, children or step-children; or
- persons who have been informed by the Home Office that although they do not qualify as a refugee, they have been granted exceptional leave to enter or remain (ELE/ELR) in the UK, their spouses, children or stepchildren; or
- European Economic Area (EEA) migrant workers, their spouses and children; or
- EU nationals and their children who are applying for tuition fee support only; or
- nationals of the Republic of Ireland.

Further details of the separate provisions for these exceptions are set out in appendix B to this annex.

Settled status

4. 'Settled status' means a person is free from any restriction on the period for which he/she may remain in the UK if he/she is:

- a British citizen. British citizens are not subject to any restriction on their length of stay in the UK. Evidence of British citizenship may be established by a UK birth certificate or a British Passport; or
- a person who has been granted indefinite leave to enter or remain (ILE/ILR). The immigration status of such applicants may be established or verified by reference to the stamp(s) in their passports or travelling documents. Examples of immigration stamps can be found in appendix A to this annex.

Residency 'decision tree'

5. Figure 1 (overleaf) will help institutions to determine whether students meet the residence conditions. This is to be used as a guide only, and institutions must follow the residency conditions set out in this annex.

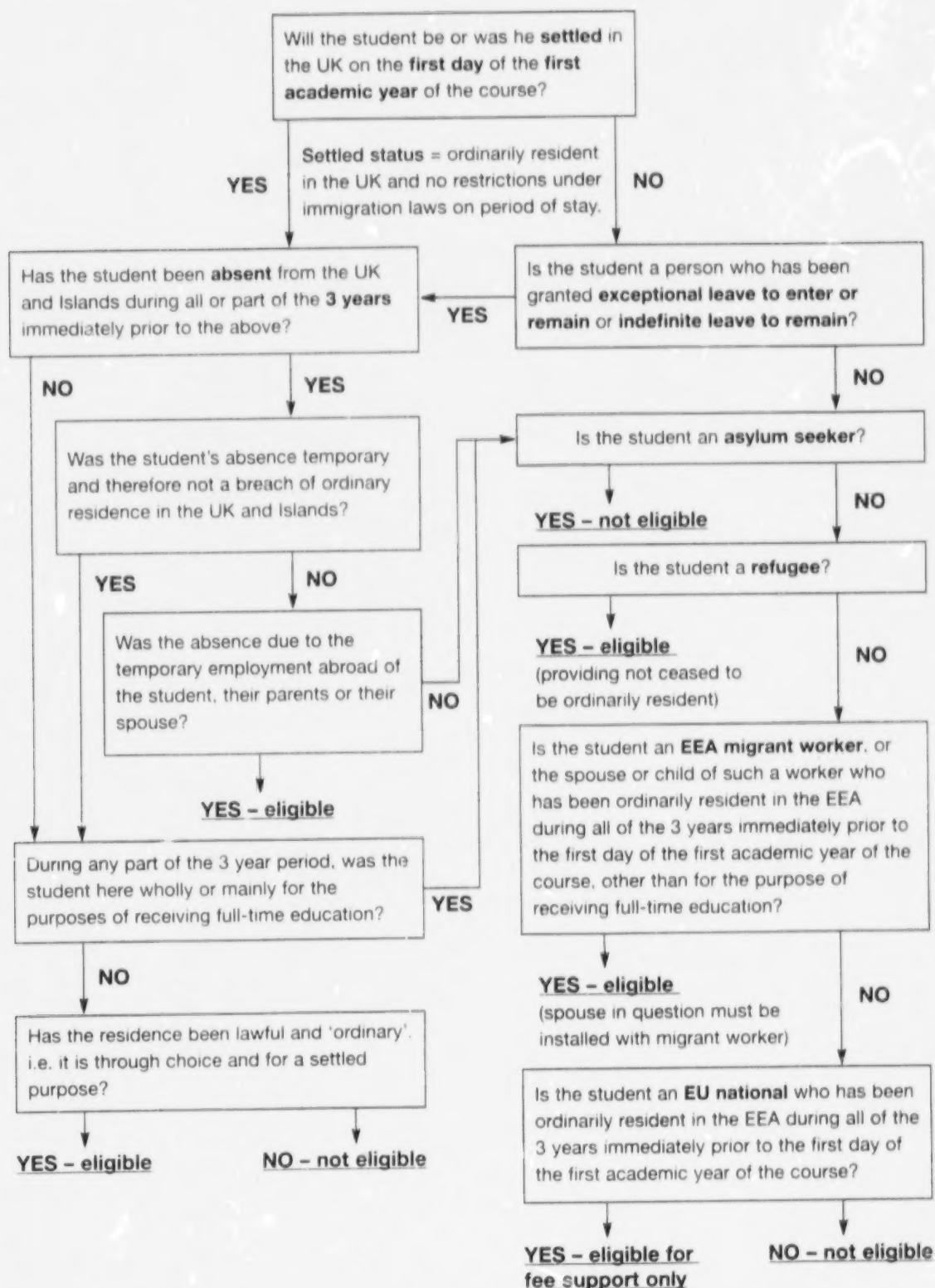
Ordinary residence

6. 'Ordinarily resident' has been defined in the courts as habitual and normal residence from choice and for a settled purpose throughout the prescribed period, apart from temporary or occasional absences of the applicant, his/her spouse or parent. Extracts from the judgment (Lord Scarman's) can be found in appendix C. The ruling did not define what might constitute a temporary or occasional absence, but did indicate that it might be possible for an individual to establish ordinary residence in two countries simultaneously.

Residence wholly or mainly for the purpose of receiving full-time education

7. The rules provide that the prescribed three-year period of ordinary residence should not include any part, however short, of ordinary residence in the UK and Islands (or the EEA where applicable) wholly or mainly for the purposes of receiving full-time education. It is for institutions to decide whether or not an applicant has been resident here 'wholly or mainly' for education purposes. This provision does not apply to refugees who have been ordinarily resident in the UK and Islands since being granted refugee status by HM Government, their spouses, children or stepchildren, as they are exempt from the three-year residence requirement.

Figure 1 Residency 'decision tree'



8. However, a student is not disqualified from support simply because he/she has been receiving full-time education during some or all of the three-year prescribed period. To be disqualified full-time education must have been the main purpose of the student's residence for some or all of the period. For example, the child or spouse of a foreign businessman or diplomat ordinarily resident in the UK and Islands may be receiving full-time education, but may be here mainly to be with their parent or spouse and so be entitled to support if the time requirements are met; a child whose parents are temporarily employed abroad may be receiving full-time education here, but his/her residence here may be mainly for the purpose of remaining in the UK with relatives rather than mainly for the purpose of attending school in the UK.

9. Students who have been in the United Kingdom and Islands as trainee nurses under contract of employment to a health authority for the period of their training should not be regarded as having been here wholly or mainly for the purpose of receiving full-time education.

10. A person who has entered the country on a student visa may initially be ordinarily resident here primarily for educational purposes, but the purpose of residence may subsequently change. If, for example, an application for refugee status is submitted to the Home Office and this later results in the granting of 'exceptional leave to remain' (rather than full refugee status), institutions may conclude from the facts of an individual case that the student's residence ceased to be primarily for educational purposes from the date of that application.

11. The main purpose of a student's residence must be determined individually in all cases.

Temporary or occasional absences from ordinary residence

12. When considering whether an applicant for support has been ordinarily resident throughout the prescribed three-year period preceding the start of the first academic year of a course, temporary or occasional absences may have to be considered.

Each absence must be considered in the context of the person's period of residence, rather than simply on the basis of the duration of the absence itself. Place of birth or nationality should play no part in this consideration. Each case should be judged on its individual merits. Rules of thumb should not be applied or specified periods of time in order to determine what constitutes a temporary or occasional absence. In making a decision, each institution will wish to consider whether it would be confident that its decision would be upheld if it were challenged in Court.

13. A student taking a gap year before entering a further education course does not break his/her ordinary residence in the UK and Islands. Such a student can be considered to meet the requirement to be ordinarily resident in England and Wales on the first day of the first academic year of the course if he/she is still abroad.

Temporary employment abroad

14. The criteria are also modified for ordinary residence and settled status in cases where a student, his/her spouse, parents, guardian or any other person having parental responsibility or care of him/her was temporarily employed abroad during any part of the three-year period. It has the effect that a student in these circumstances shall be treated as having met the three-year ordinary residence and settled status criteria.

Armed forces personnel

15. Armed forces personnel on active service abroad, and their children and spouses, satisfy the temporary employment provision. This group of people is in a special situation because of the unique nature of their employment, namely that they are bound by military law to accept overseas postings. This exemption does not include armed forces personnel who are not engaged on active service (i.e. teachers or other support staff) who are not under the same degree of compulsion to work abroad, nor does it include reservists. An example of a certificate from the Ministry of Defence that can be used for verification of the applicant's status can be found in appendix D to this annex.

Emigrants

16. Where emigrants have been employed abroad, such employment would not count as temporary under the Regulations.

Children living in the UK whose parents are temporarily employed abroad

17. Children whose parents are temporarily employed outside the UK will normally retain the relevant connection with the UK, and therefore be eligible for support, whether they travel with their parents or stay behind. Their residence should not be regarded as becoming 'wholly or mainly for the purposes of receiving full-time education', because they are still here and receiving education while their parents are temporarily employed abroad.

Making decisions in other cases

18. In other cases it is for institutions to decide whether an applicant falls within the terms of temporary absence, i.e. whether he or she would have been ordinarily resident in this country, and therefore eligible for support, had it not been for the temporary employment abroad. Rules of thumb should be avoided, such as a set number of years. Judgements should be internally consistent.

19. In reaching a judgement, institutions will wish to satisfy themselves that the period abroad arises from employment; judge whether or not the absence is temporary; and decide whether, but for the employment of the applicant (or parents or spouse etc.), he or she would have met the ordinary residence and settled status criteria. In making its decision, institutions should take into account, among other things, the nature of the posting; the terms of any contract or employer's letter; the period of time spent abroad; the time spent in this country; and whether a residence has been maintained in the UK.

20. The onus is on the applicant to satisfy the institution that: his/her absence was due to employment abroad; and this employment was temporary; and were it not for temporary employment abroad he/she would be ordinarily resident here.

21. In determining whether the absence was for purposes of employment but the applicant was not in employment immediately after moving overseas, the institution should consider:

- whether the applicant had applied for jobs prior to his/her departure
- the length of the time spent overseas before obtaining work
- whether he/she resided in the same overseas country before and after obtaining a job
- what the applicant was doing prior to obtaining a job, or between jobs.

22. In determining whether the employment was temporary or permanent, the institution should consider:

- The nature of the contract:
 - i. does the contract include liability for UK tax on earnings?
 - ii. is the posting for a specified period? If it is for an unspecified period, what is the reason for this?
 - iii. how long is the contractual period?
 - iv. is the contract renewable? Would it be normal or unusual for the contract to be renewed on its completion? Has the contract already been renewed or is it one of a succession of contracts abroad?
 - v. does the contract convey automatic rights of return to this country from time to time?
 - vi. if there is no contractual period, how long has the employee already been resident abroad?
- The nature of the work:
 - i. is it normal for the nature of the trade or profession to be mobile?
 - ii. is mobility a condition of service?
- A right of return:
 - iii. does the applicant (or parent, spouse etc.) have an automatic right of return to work in his/her organisation (or a related one) on

completion of the duty abroad?

- Periods between overseas postings:
 - iv. have such periods been spent in this country, i.e. in the employer's HQ or UK offices?
- Previous contracts:
 - v. is the present contract a first overseas posting of its type, or is it a continuation of previous similar contracts? Institutions may wish to bear in mind domestic employment case law; industrial tribunals have ruled that a succession of similar temporary contracts can be construed as permanent employment. A series of short contracts may be the result of a genuinely temporary posting, which is kept under review or may indicate a long-term posting with the contract being renewed as a matter of formality rather than a real review.

23. The list above is not exhaustive. Nor will all of the questions apply in every case. It emphasises however that each case must be dealt with on its own individual merits, and that decisions on whether employment abroad is permanent or temporary must not be decided solely on the length of period spent abroad, but in conjunction with the nature of the work and the employment pattern of the applicant. Again, the institution will wish to consider whether it would be confident that its decision would be upheld if it were challenged in Court.

Determining whether an applicant would have been ordinarily resident but for his/her temporary employment abroad

24. The applicant should be able to demonstrate that, other than for the temporary employment abroad, he or she would have been ordinarily resident here during the prescribed period. In some cases, an institution may judge that a statement of intention will provide sufficient evidence, but in most cases authorities will require something more concrete. In this connection, institutions may wish to take into account:

- ownership of property – although in many cases, this will provide sufficient evidence that an applicant would otherwise have been ordinarily resident here, in some cases it will not. For example, a property may simply be an investment or be intended for occupation only on retirement following a considerable period abroad. Non-ownership of property in the British Isles should not be taken to exclude an applicant;
- holidays – where an applicant spent any long periods of holiday or study leave;
- other business interests – does the applicant have interests, which could lead to a conclusion that he/she would be likely to return here on completion of his or her overseas tour?; and
- family or other ties with the United Kingdom, which would make a return here likely.

Students who move to England and Wales from elsewhere in the UK and Islands in order to attend a course

25. A student who has been ordinarily resident in Scotland, Northern Ireland, the Channel Islands, or the Isle of Man who moves to England or Wales specifically for the purpose of attending the current course or a previous designated course which the student was attending immediately before the current course should be regarded as being ordinarily resident in the place from which he has moved.

Appendix A to Annex C Immigration stamps

ON ENTRY	AFTER ENTRY
CODE 1A Leave to enter the United Kingdom is hereby given for/until For exceptional leave to enter given at port the Rules <u>or</u> varied leave at port	Leave to remain in the United Kingdom is hereby given Until..... on behalf of the Secretary of State Home Office Date..... For exceptional leave to remain <u>or</u> leave to remain exceptionally outside

CODE 1: No recourse to public funds, can work. Used for: **Marriage, Doctors, Some dependents, UK Ancestry**

Leave to enter for/until
No recourse to public funds Work (and any changes) must be authorised



NEW VERSION: Introduced at ports on 30 July 2000 (only
given by an Immigration Officer at the port of entry)

CODE 2: No recourse to public funds, consent to work already deemed to be given.
Used for: **Work Permit Holders, TWES and Students**

Leave to remain in the United Kingdom, on Condition that the holder maintains and accommodates himself and any dependants without recourse to public funds, does not enter or change employment paid or unpaid without the consent of the Secretary of State for the Home Department is hereby given Until..... 	

CODE 3: Various types of visitors, up to 6 months. No work paid or
unpaid, no public funds. Used for: **Business, Academic, Tourist, Visitors for Private medical treatment and People in Transit**

CODE 4: Specified employment/employer. Names employer and Private Servants. Used for: **Au-Pairs, Working Holidaymakers, Overseas Domestic Workers, Seasonal Agricultural Workers**

Leave to enter for/until
To work as/with
Changes must be authorised
No recourse to public funds

NEW VERSION: Introduced at ports on 30 July 2000 (only given by an Immigration Officer at the port of entry)



CODE 5N: Temporary category, maximum 6 months, no employment, no public funds. Used for: **Visitors**

INDEFINITE LEAVE TO ENTER

Given indefinite leave to enter the United Kingdom

INDEFINITE LEAVE TO REMAIN

Leave to enter the United Kingdom on Condition that the holder maintains and accommodates himself and any dependants without recourse to public funds is hereby given

Until.....

The holder is not engaged in employment paid or unpaid other than with.....

.....
and is not to engage in any business or profession without the consent of the

.....
Secretary of State for the Home Department

.....
On behalf of the Secretary of State
Home Office

GIVEN LEAVE TO REMAIN IN THE UNITED KINGDOM FOR AN INDEFINITE PERIOD.

Signed

On behalf of the Secretary of State Home Office

Date

ON ENTRY

AFTER ENTRY

AUTHENTICATION



The Immigration officer's **arrival** stamp shows the date and port of arrival. It is used to authenticate leave to enter code stamps. If a person has previously been given indefinite leave to enter or remain in the UK the Immigration officer will stamp the passport with his date stamp alone



This stamp is used by the Home Office after entry to authenticate grants of limited leave



The Immigration officer's **embarkation** stamp shows the date and port of departure from the UK. Immigration officers do not put embarkation stamps

NO TIME LIMIT

There is at present no time limit on the holder's
Stay in the United Kingdom

ind ★ PCU

On behalf of the Secretary of State Home Office
date:

CODE 8: This stamp is used to transfer a passenger's existing LTE/LTR from their previous passport

Code
The holder has leave to enter/remain that was granted on
By
and expires on

Leave Varied to: Used to extend an LTE/LTR and followed by one of the immigration stamps under the following circumstances:

Leave varied to:

- Already has LTE/LTR in one category and wishes to be given LTE in another capacity;
- Wants to extend the existing LTE/LTR;
- To rectify an error on Entry Clearance i.e. conferred LTE

CANCELLED

(Red ink endorsement)

This endorsement is used to cancel a passenger's permission to stay in the United Kingdom

Note: 'Public funds' include housing, social security and income related benefits. They do not include education and health funds.

Appendix B to Annex C **Separate provisions**

Asylum seekers

1. Asylum seekers may achieve one of three outcomes as shown in Figure 2. Those achieving outcome 2 may be given indefinite leave to remain at the end of the period of exceptional leave.

Refugees

2. A refugee is defined as someone who is outside their own country of origin and who has a well founded fear of returning there because they may be persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion. Such a person is unable, or in fear of, or unwilling to return to their former country of residence.

Asylum seekers who have been granted refugee status (stage 3)

3. Refugees, their spouses, children and stepchildren are eligible for Hardship Fund support provided the refugee is ordinarily resident in England and Wales on the first day of the first academic year of the course and has not ceased to be ordinarily resident since being recognised as a refugee. A person who has been successful in their application for refugee status will have been given a letter from the Home Office stating that they have been granted indefinite leave to remain in/enter the UK as a refugee recognised under the 1951 United Nations Convention. Students who fit the above

criteria are not required to demonstrate settled status on the first day of the first academic year of the course and can also become eligible to receive Hardship Fund support during their course after they, their spouse or parent is granted refugee status.

Asylum seekers who have been awarded exceptional leave to enter or remain (stage 2)

4. The Home Office grants 'exceptional leave to enter or remain' (ELE or ELR) in a number of circumstances. Institutions are only concerned with those students who applied to the Home Office for asylum and have not been granted refugee status. Instead they have been awarded ELE/ELR, or they are the spouse, child or stepchild of such a person. ELE/ELR is not asylum and does not constitute recognition as a refugee within the meaning of the United Nations Convention.

5. ELE/ELR is not the same as indefinite leave to remain. It is normally granted to a set calendar date (four years from the date of the application) although in some circumstances it is granted for a shorter period. The applicant should have been sent a letter by the Home Office stating that, whilst they are not recognised as a refugee, they have been granted exceptional leave to remain. After completing four years exceptional leave to enter or remain

Figure 2 **Asylum seeker outcomes**

Student Support Criteria

	Outcome 1	Outcome 2	Outcome 3
Application made to the Home Office for asylum	Refugee status granted	Exceptional leave to enter or remain (ELE/ELR) granted	Asylum application refused
Not eligible for Student Support	Eligible for Student Support (immediate entitlement)	Eligible for Student Support only if 3-year residence requirement met	Not eligible for student support

it is open to the person to apply for settlement, at which point indefinite leave to remain is usually granted.

6. Students granted ELE/ELR do not have the same immediate entitlement to Hardship Fund support as have recognised refugees. **These students must meet the usual three-year residence requirement before the first day of the first academic year of the course.** Such persons, their spouses, children and step-children are exempted from the requirement to be settled in the United Kingdom within the meaning of the Immigration Act 1971 on the first day of the first academic year of their course and can, therefore, become eligible to receive Hardship Fund support during their course, after they, their spouse or parent is granted ELE/ELR.

Asylum seekers who have been awarded indefinite leave to remain in the UK as a result of backlog clearance

7. The Home Office Immigration and Nationality Directorate (IND) introduced special backlog clearance measures to speed up the processing of asylum applications made before 1 July 1993. The regulations have been amended to reflect these special measures so that applicants and their dependants granted indefinite leave to enter or remain (instead of the normal ELE/ELR), under these special measures, become eligible for support where this was granted during the course as in paragraphs 4-6. The exercise is now complete and it is unlikely that any new students will fit this description.

Temporary refuge

8. The immigration status of students granted short time stay for reasons not covered above is not always clear and the DfES has been advised that checks with IND should be made in individual cases, or the student asked to provide documentation of their status.

European Economic Area migrant workers

9. Migrant workers and their spouses, children and stepchildren are eligible for Hardship Fund support where they are ordinarily resident in England and Wales on the first day of the first academic year of the course and meet the requirement of three years

ordinary residence in the European Economic Area (EEA). They are not required to have settled status in the UK.

10. 'Migrant workers' are EEA nationals who have taken up an activity as an employed person in the UK, under EU Council Regulations.

11. Students who cease work before starting their course will retain their status as migrant workers if there is a link between their work and their studies. There has been little guidance from the European Courts of Justice (ECJ) on what constitutes a sufficient 'link' between the course of study and the previous employment for these purposes. In the cases of *Lair* and *Bernini* the Court indicated that what was important was the relationship between the purpose or subject matter of the studies and the previous employment. This principle does not apply where a person has been employed in the UK but has subsequently 'become involuntarily unemployed and is obliged as a result of the situation of the labour market to transfer to another employment sector'.

12. However, where a student continues to work while he is studying, a recent Opinion from the Advocate General in the case of *Grzelczyk* indicates that he does not need to show a link between his employment and his studies in order to retain his status as a migrant worker.

Employment which is ancillary to their studies

13. An applicant is not eligible for Hardship Fund support if he/she has taken up employment with a view to undertaking subsequent studies related to the same field of activity, and would not have been taken on by his/her employer if he/she had not already been accepted for admission to the course in respect of which he/she has applied for support.

14. Where a person has taken up employment in the UK solely for the purpose of becoming eligible for Hardship Fund support, institutions will be under no duty to bestow such support on him/her.

15. EEA nationals are generally entitled to be classified as migrant workers for a period of up to six months from their arrival in the UK where they have arrived in the UK without work but are actively seeking employment. Under EC law, a

national of a member state has the right to enter the territory of another member state, not only to pursue an occupation as an employed person, but also to look for such an occupation. This right to enter and reside in another member state for the purpose of seeking work is not, however, a permanent one. Individuals concerned should be given a reasonable time within which to apprise themselves of offers of employment comparable to their qualifications and to take the necessary steps to be engaged. A period of six months is generally considered sufficient. The eligibility of such a student will remain subject to them meeting the residence requirement of three years ordinary residence in the EEA.

Remuneration for work

16. EEA nationals who came to the UK to work but received something less than a market rate salary for their work, may still fall within the definition of a migrant worker. In the case of *Brown* the ECJ set out a definition of a migrant worker.

'any person who pursues an activity which is effective and genuine, to the exclusion of activities on such a small scale as to be regarded as purely marginal and ancillary, is to be treated as a worker. The essential characteristic of the employment relationship is that for a certain period of time a person performs services for and under the direction of another person in return for which he receives remuneration.'

17. The ECJ has said that 'remuneration' means consideration for the services in question, and therefore if someone works in exchange for, for example free food, free accommodation or an allowance, they may still be considered to be a worker.

18. In effect the test to be applied is as follows:

- Is the person in an employment relationship in which he/she performs services in return for remuneration?
- Is he/she pursuing an activity, which is effective and genuine?
- Is this activity on such a small scale as to be regarded as purely marginal and ancillary?

19. In trying to decide whether a person's employment is ancillary to another activity – applying the third part of the test – it may be relevant to look at, amongst other things, whether his/her employment is full-time and salaried. For example, if a person is employed full-time at a market rate this would be a fairly good indication that his/her employment was not ancillary to their studies. However, this does not mean that a person must be employed full-time at a market rate in order to be a worker. As already indicated, if the activity were ancillary then the person would not fulfil the criteria for migrant worker status.

Spouses of EEA migrant workers

20. The spouse of an EEA migrant worker is eligible for Hardship Fund support on the same basis as the migrant worker him/herself, provided that the spouse is installed with the migrant worker in the UK. The ECJ requires only that the migrant worker had accommodation available for his/her family, which would be considered normal for the purpose of accommodating the family. However, there was no requirement that the spouses must be permanently living together. The ECJ held that this was consistent with the spirit of Article 11 of the regulation, which gives members of the family the right to take up an activity as an employed person throughout the territory of the member state concerned, even though that activity is exercised at a place some distance from the place where the migrant worker lives. Once migrant workers are divorced, the same rules will not of course apply. But, whilst they are separated, even if they intend to divorce later they are still spouses for the purposes of these Regulations. The spouse must meet the same ordinary residence test as the migrant worker. The nationality of the spouse is not relevant; both EEA and non-EEA nationals are eligible.

Children of EEA migrant workers

21. For the purposes of this provision 'parent' is defined as including a guardian, any other person having parental responsibility for a child and any person having care of a child. In every case the parent must have established migrant worker status in this country and the child must meet the same ordinary residence test as the migrant worker. The

child should be able to produce evidence that he or she was admitted to the United Kingdom as a child of a migrant worker. The fact that the migrant worker parent has since died, or that the child is for other reasons no longer dependent on the migrant worker, does not necessarily result in losing entitlement. However, where the parent is still living, they must still be residing within the UK and have retained their migrant worker status.

UK nationals who are migrant workers

22. UK nationals (for this purpose includes British citizens, British subjects who have the right of abode in the United Kingdom, and dependent territories citizens who acquired that citizenship by reason of a connection with Gibraltar) may acquire the status of EEA migrant workers in the same fashion as nationals of any other member state. UK nationals who move to another member state for the purpose of employment, and then return to the UK for the same purpose, will be migrant workers, and they, their spouses and children will not be required to satisfy the three-year ordinary residence requirement in the UK. They do however need to be ordinarily resident in England and Wales on the first day of the first academic year of the course and meet the required three-year ordinary residence in the EEA.

EU nationals

23. EU nationals or the children of EU nationals, who are not an EEA migrant worker or the spouse or child of a migrant worker must be able to show that they have settled status in the UK in order to be eligible for support. Under EC law, nationals of EEA member states (including EU nationals) are granted the right to live and work in the UK. This is called a right of residence. EEA nationals have a right of residence providing they are working in the UK, or they are not economically active but do have sufficient funds to finance their stay without claiming public funds. EEA nationals do not automatically have settled status in the UK. This is something they may apply for if they wish. It is not compulsory in terms of immigration status, and they may stay in the UK for as long as they want providing they meet the requirements above. Further details are given in the Home Office leaflet

'Information about Nationals of the European Economic Area'.

EU students

24. EU nationals, or the children of an EU national, who do not meet the above criteria may be eligible for fee support but not for any living cost support. Students who become EU nationals within three months of the start of the academic year, because their State joins the EU, will be eligible for fee support for that academic year and any subsequent academic year.

25. Although these students are not required to have settled status or to be ordinarily resident in the UK on the first day of the first academic year of the course, they are required to have been ordinarily resident in the EEA for the three years preceding that day. However, nationals of non-EU members of the EEA or their children are not entitled to Hardship Fund support under this provision.

Nationals of the Republic of Ireland

26. Nationals of the Republic of Ireland are treated as settled in the UK for immigration purposes and therefore do not need to have formal confirmation of their status endorsed in their passports. In order for such a student to be eligible for fees and living costs, they must be ordinarily resident in England and Wales on the first day of the first academic year of the course and must have been ordinarily resident in the UK and Islands throughout the three-year period preceding the first day of the first academic year of the course. Their residence in the UK during the three-year period must not have been wholly or mainly for the purpose of receiving full-time education. An Irish national, who does not meet the ordinary residence requirement, may be considered to see if he satisfies the requirements to be regarded as a migrant worker or an EU student.

Appendix C to Annex C 'Ordinarily resident'

Extracts from Lord Scarman's judgement

The following are extracts from the judgement given in the House of Lords on 16 December 1982, as reported in [1983] 2 WLR 16.

At page 31 H:

'It is my view that LEAs, when considering an application for a mandatory award, must ask themselves the question: has the applicant shown that he has habitually and normally resided in the United Kingdom from choice and for a settled purpose throughout the prescribed period, apart from temporary or occasional absences? If an LEA asks this, the correct question, it is then for it, and it alone, to determine whether as a matter of fact the applicant has shown such residence. An authority is not required to determine his 'real home', whatever that means; nor need any attempt be made to discover what his long-term future intention or expectations are.

The relevant period is not the future but one which has largely (or wholly) elapsed, namely that between the date of the commencement of his proposed course and the date of his arrival in the United Kingdom. The terms of an immigrant student's leave to enter and remain here may or may not throw light on the question: it will, however, be of little weight when put into the balance against the fact of continued residence over the prescribed period – unless the residence is in itself a breach of the terms of his leave, in which event his residence, being unlawful, could not be ordinary.'

At page 27 B-G:

'There are two and no more than two, respects in which the mind of the "propositus" (the student applicant) is important in determining ordinary residence. The residence must be voluntarily adopted. Enforced presence by reason of kidnapping or imprisonment, or a Robinson Crusoe existence on a desert island with no opportunity of escape, may be so overwhelming a factor as to negative the will to be where one is. And there must be a degree of settled purpose. The purpose may be one; or there may be several. It may be specific or general. All the law requires is that there is a settled purpose. This is not to say that the "propositus" intends to stay where he is indefinitely; indeed his

purpose, while settled, may be for a limited period. Education, business or profession, employment, health, family, or merely love of the place spring to mind as common reasons for a choice of regular abode. And there may well be many others. All that is necessary is that the purpose of living where one does has a sufficient degree of continuity to be properly described as settled.

The legal advantage of adopting the natural and ordinary meaning, as accepted by the House of Lords in 1982 and recognised by Lord Denning in this case, is that it results in the proof of ordinary residence, which is ultimately a question of fact, depending more upon the evidence of matters susceptible of objective proof than upon evidence as to the state of mind. Templeman L.J emphasised in the Court of Appeal the need for a simple test for LEAs to apply: and I agree with him. The ordinary and natural meaning of the words supplies one. For if there is to be proved a regular, habitual mode of life in a particular place, the continuity of which has persisted despite temporary absences, ordinary residence is established provided only if it is adopted voluntarily and for a settled purpose.

An attempt has been made in this case to suggest that education cannot be a settled purpose. I have no doubt it can be. A man's settled purpose will be different at different ages. Education in adolescence or early adulthood can be as settled a purpose as a profession or business in later years. There will seldom be any difficulty in determining whether residence is voluntary or for a settled purpose: nor will enquiry into such questions call for any deep examination of the mind of the "propositus".'

Appendix D to Annex C **Armed Forces personnel**

REGULAR MILITARY AND AIR FORCES AND ROYAL NAVY FORCES
CERTIFICATE OF TEMPORARY EMPLOYMENT OUTSIDE THE UNITED KINGDOM
ELIGIBILITY FOR HARDSHIP FUND SUPPORT

I certify that:

Number Surname Initials

Rank

Unit

has been in continuous service as a member of the regular military or air forces or of the
Royal Navy forces since:

(date)

and that he*/she* is the spouse*/ parent*/ guardian*/ has parental responsibility for */ has
care of* (*delete as applicable)

Surname Initials Date of Birth

Signed

Name

Rank

Unit Records Officer

Date

Telephone Number

Unit Address
.....
.....
.....
.....
.....



Unit Stamp

[Note: this certificate should be used to support a claim for exemption from the UK ordinary
residence requirements.]

Annex D **Dance and drama awards: connected institutions**

Private institution	Connected HEI
Birmingham School of Speech & Drama	University of Central England in Birmingham
Bird College – Dance & Theatre Performance	Greenwich University
Bristol Old Vic Theatre School	University of the West of England
Guildford School of Acting	Surrey University
Italia Conti Academy of Theatre Arts Ltd	South Bank University
Laban Centre London	City University
London Studio Centre	Middlesex University
Mountview Academy of Theatre Arts	Middlesex University
Royal Academy of Dance	Durham University

Annex E Advice on issuing short-term loans from the Hardship Fund

1. Institutions will need to make some checks before making a Hardship Fund payment to students needing a short-term loan. A suggested checklist is below:

- full name, contact address, telephone number and proof of identity
- the student is registered or enrolled on a designated course
- the student has applied for a loan (or at least requested an application form from the LEA)
- if the student has changed course since the original application, that he has informed the LEA
- basic eligibility (see below).

2. If these checks suggest a payment should be made, the student should be asked to sign a declaration of eligibility, if their eligibility as a home student has not already been established by the LEA. Some wording is suggested here.

'I, [name of student], hereby certify that to the best of my knowledge I fulfil the following criteria:

There are no restrictions on my stay and I am therefore "settled" within the UK (as defined in the Immigration Act 1971). [Anyone with full refugee status or with exceptional leave to remain or enter the UK meets this requirement.]

I have been ordinarily resident within the UK or Islands for three years immediately before the start of my course. [Students with full refugee status do not need to meet this requirement, and EEA migrant workers (or their spouses/children) must have been resident within the European Economic Area, rather than the UK and Islands.]

None of this time was wholly or mainly for the purposes of receiving full-time education.'

3. If a student gives inconsistent information, or if the institution is aware of contradictory evidence, it should not make a payment. In these circumstances, the student could be asked to return later, to allow time for further checks to be made, for example with the LEA. Where necessary, institutions could make a very small payment to tide such students over until the date of the next interview.

4. Institutions should also ask the student to sign a declaration that they will repay the loan. Some recommended wording is below. This gives institutions the flexibility to pursue the non-repayment of loans if a student leaves the course or does not receive a student loan:

'I acknowledge receipt of cash/cheque/(other,...) of [£ amount] from [name of institution]. I hereby promise to repay this amount in full (i) within 10 days of receiving the first instalment of my main student loan, or (ii) at the end of the academic year, or (iii) when I leave the course, whichever is the earlier.'

Annex F The Foyer scheme

1. As outlined in Section 1, the Foyer scheme offers support for young homeless people entering higher education. A central plank of the Foyer Federation bursary for Foyer residents is the mentoring scheme.

2. Three tiers of support accompany the bursary:

- a. Peer mentoring. This is done primarily by second and third year HE students, who support Foyer students with the difficult transitions of the first year at university.
- b. HEI pastoral and financial support.
- c. The national University Support Manager, who acts as an advocate for students when necessary. Students are asked to commit to contacting the University Support Manager to seek help before abandoning their studies.

3. A questionnaire has been sent to interested Foyers to be filled in by individual residents registering in the scheme. The questionnaire covers, amongst other things, details of the institutions and courses they have applied to plus preferences for their mentors. This enables the University Support Manager to make early contact with HEIs regarding existing mentoring projects.

4. In August, after students have decided which HEI they will attend, the University Support Manager will finalise contacts for mentors at the relevant HEIs.

5. To find mentors for the first year of the scheme (in subsequent years mentees can become mentors) the University Support Manager will contact widening participation offices in universities, individual Student Unions and projects such as Student Community Action, in addition to contacting existing national mentoring schemes. Finding mentors will be easier in those HEIs with established mentoring projects. For students who apply to HEIs without established projects, individual arrangements will be made, for example, through religious groups, or through departments running relevant courses such as social administration. Postgraduate students may also be asked to act as mentors.

6. For further information on the Foyer scheme contact the University Support Manager at the University of the West of England by e-mail at eira.makepeace@uwe.ac.uk or tel 0117 344 2561.

Part 4 Summary report on the use of student support funds in 2000-01

Introduction

1. This report provides a summary of the information returned by HEFCE-funded institutions in receipt of student support funding during the academic year 2000-01. It evaluates the monitoring process and then analyses the data from the returns to identify trends. The tables at Appendix 1 summarise spending in 2000-01.

Funds available

2. For the academic year 2000-01, the DfES gave the HEFCE a total of £83,862,126 excluding administration funds. This was broken down as follows:

- Undergraduate Fund – £49,069,263
- Postgraduate Fund – £6,755,213
- Further Education Fund – £1,024,649
- Fee Waiver Fund – £12,361,700
- Mature Student Bursary Fund – £14,690,000

3. In January 2001 institutions were also allocated £1,566,169 in funds returned from previous years, making the total funds available for 2000-01 £85,466,994.

4. The DfES also allocated £1.36 million from the user support baseline to the Learning and Skills Council for the HE students in further education colleges. In addition to this £114,474 was allocated to the Teacher Training Agency (TTA) for School Centred Initial Teacher Training (SCITT).

Allocation

5. The individual allocations to institutions were published in HEFCE 00/28 'Hardship Funds for higher education institutions 2000-01'. The allocation was made on the basis of the number of full-time equivalent students, weighted according to level and mode of study, and age group and neighbourhood type.

Commentary

6. An individualised monitoring disk was sent to institutions for completion for return by 7 November 2001. The monitoring return requested information on the spend for 2000-01.

7. The overall quality of data improved from the previous year. The majority of returns were received by the Council by the return date; however once again this year some were not returned until December.

Analysis

8. The analysis describes the trends in spending during 2000-01 and compares these trends with the spend in 1999-2000 where appropriate. The comparisons between 2000-01 and 1999-2000 have been made on a proportional basis.

Opportunity Bursaries 2001-02 interim return

9. Of the 5,900 students who received an Opportunity Bursary, 63 per cent were from Excellence in Cities areas, 20 per cent were from Education Action Zones and 16 per cent were from areas other than EiC areas or EAZs. There were 470 unspent Opportunity Bursaries, which were re-allocated in January 2002.

2000-01 Access and Hardship monitoring return

Table 1: Mature Student Bursaries end of year return

10. This table shows that 15,828 Mature Student Bursaries were distributed in 2001-02. The average Bursary awarded was £867. Over 90 per cent of the money available was spent on Mature Student Bursaries.

Table 2a (i and ii): Payments for hardship (excluding payments for part-time Fee Waivers and Mature Student Bursaries)

Table 2a(i): Payments for hardship

11. The data show that in 2000-01, as in 1999-2000, the bulk of payments made for general hardship (excluding payments for Fee Waivers and Mature Student Bursaries) were given to full-time undergraduate students, over 80 per cent of which were given to students who were over 21. This reflects the accepted view that older students generally have higher costs than younger students, and fewer sources of alternative support. The fact that the main group to benefit was older students

also shows that the criteria for Hardship Funds continue to function correctly, especially as this group is likely to contain the highest proportion of lone parents.

12. In comparison with 1999-2000 when numbers decreased compared to the previous year, there has been an increase in the number of part-time undergraduates who received a payment.

Table 2a(ii) Bursary schemes through the Hardship Fund

13. There is a slight increase in the number of bursaries issued through the Hardship Fund (not including Mature Student Bursaries), compared to last year. A total of 3,264 students were awarded bursaries compared to 2,773 in 1999-2000. The average bursary also increased, from £711 to £807.

Table 2b: Payments for Fee Waiver funds – part-time undergraduate students only

14. Expenditure on Fee Waivers increased markedly compared to 1999-2000, up from £8.8 million to £12.7 million. The majority of students who received a Fee Waiver were 25 or over (89 per cent), which mirrors the pattern seen in Table 2a(i), and met the criteria that they were on benefit or a low income.

Table 3: Reason for payment for hardship

15. As in 1999-2000, the largest proportion of payments in 2000-01 went to cover accommodation costs and the greatest average payment was for childcare costs.

Table 4: Loans for repayment

16. The data for 2000-01 show a similar result to those returned for 1999-2000. Once again institutions recouped 69 per cent of loans paid out. The majority of the funding (65 per cent) was used for students who did not have loan cheques, and the minority (35 per cent) was given for other reasons. However there was a reduction in money expended to cover loans, down to £2.7 million in 2000-01 from 4.8 million in 1999-2000.

Table 5: Periodic information and interest earned

17. The amounts of interest institutions are earning is in line with Council expectations and similar to 1999-2000.

Table 6: Summary

18. The summary table shows that institutions have spent 94 per cent of the funding available. Of the remaining funds, 5 per cent will be carried forward to 2001-02 and 1 per cent will be reclaimed by the Council.

Conclusion

19. Overall the monitoring return data show that student support funds have been successfully targeted at the groups identified by the Government. Table 6 shows that the vast majority of the funding was spent, with only small amounts of funding carried forward or returned to HEFCE. We intend to provide data from the monitoring return, good practice publications and seminars to inform institutions' forward planning in relation to student support.

Part 4 Appendix 1 **Summary data from the Opportunity Bursaries 2001-02 interim return and the 2000-01 Access and Hardship fund monitoring return**

Opportunity Bursaries 2001-02 interim return

Where the student is from		Number of Opportunity Bursaries initially allocated by HEFCE for 2001-02	Number of students awarded Opportunity Bursaries by 31 October 2001 who are attending this institution in 2001-02*	Funds required to make payments to students in 2001-02 (£)	Adjustment to initial allocation from the Opportunity Bursaries Fund (£)
Excellence in Cities area			3,734.00	3,734,000.00	
Non-Excellence in Cities area	Education Action Zone		1,194.00	1,194,000.00	
	Non-Education Action Zone		972.00	972,000.00	
Total		6,370.00	5,900.00	5,900,000.00	-470,000.00

2000-01 Access and hardship monitoring return

Table 1: Mature Student Bursaries end of year return

	Total allocation (first payment plus any top-up minus any funds returned mid-year)	Bursaries awarded (from the Mature Student Bursary Fund or the Hardship/Fee Waiver Funds)		Difference between allocation for and spend on Mature Student Bursaries
		Number of bursaries	Total amount in bursaries (£)	
Total	14,815,800.00	15,828.00	13,715,359.66	1,100,440.34

2000-01 Access and Hardship monitoring return

Table 2a(i) - Payments for hardship (including payments made as loans, excluding payments for part-time Fee Waivers and Mature Student Bursaries)

Level	Mode	Age (years) at time of payment						Total		
		Under 21		21-24		25 and over				
		Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of applicants (successful + unsuccessful)	Number of successful applicants	Payments made (£)
Undergraduate	Full-time	18,328.00	7,702,272.66	29,036.00	16,355,950.19	27,343.00	24,206,460.63	87,805.00	74,707.00	48,264,683.48
	Part-time	281.00	75,784.94	1,125.00	304,063.01	8,623.00	1,965,900.33	10,757.00	10,029.00	2,345,748.28
Postgraduate	Full-time	200.00	96,103.00	2,764.00	2,181,227.94	4,244.00	4,100,880.50	8,412.00	7,208.00	6,378,211.44
	Part-time	24.00	8,267.00	237.00	169,756.65	1,507.00	1,164,969.94	2,032.00	1,768.00	1,342,993.59
Further Education	Full-time	1,300.00	529,460.52	202.00	142,527.73	435.00	318,456.52	2,041.00	1,937.00	990,444.77
	Part-time	29.00	15,508.96	62.00	29,032.49	250.00	137,818.05	392.00	341.00	182,359.50
Total		20,162.00	8,427,397.08	33,426.00	19,182,558.01	42,402.00	31,894,485.97	111,439.00	95,990.00	59,504,441.06

Table 2a(ii) - Bursary schemes through the Hardship Fund (a subset of the data in the above table and excluding Mature Student Bursaries)

	Number of successful applicants	Payments made (£)
Total	3,264.00	2,635,169.74

Table 2b: Payments for Fee Waivers - part-time undergraduate students only

Reason for payment	Age (years) at time of payment						Total	
	Under 21		21-24		25 and over			
	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)
Job-loss	4.00	1,963.00	35.00	17,633.00	186.00	102,090.04	225.00	121,686.04
Benefits/low income	405.00	227,410.75	1,911.00	1,128,877.52	19,520.00	11,265,583.50	21,836.00	12,621,871.77
Total	409.00	229,373.75	1,946.00	1,146,510.52	19,706.00	11,367,673.54	22,061.00	12,743,557.81

2000-01 Access and Hardship monitoring return

Table 3: Reason for payment for hardship (including payments made as loans, excluding payments for part-time Fee Waivers and Mature Student Bursaries)

	Reason for payment							
	Assistance with disability costs		Child care		Transport		Books and equipment	
	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)
Total	3,726.47	1,726,491.28	8,383.29	9,791,461.72	7,785.57	4,605,161.65	11,644.07	3,105,176.05

Reason for payment								Total	
Non-tuition fees (e.g. field trips)		Accommodation		Utility costs		Other or unspecified hardship			
Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)
1,355.34	731,886.08	21,350.05	14,274,107.98	7,772.15	4,554,168.60	33,973.06	20,715,987.70	95,990.00	59,504,441.06

Table 4: Loans for repayment

	Number of successful applicants	Paid out (£)	Repaid within year (£)	Repaid from previous years (£)	Outstanding within year (£)
Loans to students whose loan cheque from the SLC is delayed	7,376.00	1,749,759.27	1,304,904.82	113,324.93	444,854.45
Other loans	3,925.00	953,096.98	555,708.90	130,292.70	397,388.08
Total	11,301.00	2,702,856.25	1,860,613.72	243,617.63	842,242.53

2000-01 Access and Hardship monitoring return

Table 5: Periodic information and interest earned (all funds - Hardship Fund, Fee Waiver Fund and Mature Student Bursary Fund)

	Source of funds	1 September to 31 December	1 January to 31 March	1 April to 31 August	Total
Available funds for 2000-01	Add: Funds allocated by the HEFCE	45,789,995.00	33,957,314.00	5,684,919.00	85,432,228.00
	Less: Mature Student Bursaries initial allocation returned mid-year	0.00	36,900.00	0.00	36,900.00
	Add: Loans repaid from previous years	243,617.63	0.00	0.00	243,617.63
	Add: Funds brought forward from 1999-2000	2,674,039.54	0.00	0.00	2,674,039.54
	Less: Funds used to repay outstanding loans from previous years*	13,312.70	941.00	12,879.71	27,133.41
	Add: Interest earned	295,918.84	183,875.96	494,641.30	974,436.10
Funds disbursed during 2000-01	Add: Funds paid to students (including those from loans repaid)	37,260,860.05	25,368,678.59	23,333,819.89	85,963,358.53
	Add: Interest used to defray audit costs, train staff or publicise funds	65,375.26	26,251.05	129,020.47	220,646.78
	Less: Loans repaid within year	0.00	0.00	1,860,613.72	1,860,613.72
Total available funds for 2000-01		48,990,258.31	34,103,348.96	6,166,680.59	89,260,287.86
Total funds disbursed during 2000-01		37,326,235.31	25,394,929.64	21,602,226.64	84,323,391.59

Table 6: Summary

	Hardship Fund	Mature Student Bursaries Fund	Fee Waiver Fund	Total	Total as percentage of available funds
Add: Funds allocated in 2000-01	58,217,828.00	14,852,700.00	12,361,700.00	85,432,228.00	
Add: Funds brought forward from 1999-2000	2,674,039.54	-	-	2,674,039.54	
Add: Interest earned during 2000-01	974,436.10	-	-	974,436.10	
Add: Loans repaid (from previous years)	243,617.63	-	-	243,617.63	
Less: Mature bursaries initial allocation returned mid-year	-	36,900.00	-	36,900.00	
Less: Funds used to repay outstanding loans from previous years	27,133.41	-	-	27,133.41	100.00
Less: Funds disbursed (including those from loans repaid)	59,725,087.84	13,715,359.66	12,743,557.81	86,184,005.31	
Add: Loans repaid (within year)	1,860,613.72	-	-	1,860,613.72	94.47
Total funds remaining	4,218,313.74	1,100,440.34	-381,857.81	4,936,896.27	5.53
Funds HEIs wish to carry over to 2001-02				4,168,200.68	4.67
Overspend in 2000-01				-164,923.41	-0.18
Funds to be reclaimed by HEFCE				933,619.00	1.05

Part 5 Amended Opportunity Bursaries 2002-03 interim return

First-year students

Where the student is from	Number of Opportunity Bursaries initially allocated by HEFCE in 2002-03 for first-year students	Number of Opportunity Bursaries remaining from 2001-02	Number of applications for Opportunity Bursaries in 2002-03 (successful and unsuccessful)	Number of first-year students awarded Opportunity Bursaries at this institution by October 31 2002		Number of first-year students awarded an Opportunity Bursary at another institution by October 31 2002, who are attending this institution in 2002-03	Funds required to make payments to first-year students in 2002-03 (£)	Adjustment to initial allocation from the Opportunity Bursaries Fund (£)
				Who are attending another institution in 2002-03	Who are attending this institution in 2002-03			
Excellence Challenge area			0 00	0 00	0 00	0 00	0 00	
Non-Excellence Challenge area			0 00	0 00	0 00	0 00	0 00	
Total	0 00	0 00	0 00	0 00	0 00	0 00	0 00	0 00

Second-year students

Where the student is from	Number of Opportunity Bursaries initially allocated by HEFCE in 2002-03 for second-year students	Number of second-year Opportunity Bursary award holders, who attended this institution in 2001-02		Number of second-year Opportunity Bursary award holders, who attended another institution in 2001-02, who are attending this institution in 2002-03	Funds required to make payments to second-year students in 2002-03 (£)	Adjustment to initial allocation from the Opportunity Bursaries Fund (£)
		Who are attending another institution in 2002-03	Who are attending this institution in 2002-03			
Excellence Challenge area		0 00	0 00	0 00	0 00	
Non-Excellence Challenge area		0 00	0 00	0 00	0 00	
Total	0 00	0 00	0 00	0 00	0 00	0 00

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Part 6 Monitoring return 2002-03

Opportunity Bursaries 2003-04 interim return

First-year students

Where the student is from	Number of Opportunity Bursaries initially allocated by HEFCE in 2003-04 for first-year students	Number of applications for Opportunity Bursaries in 2003-04 (successful and unsuccessful)	Number of first-year students awarded Opportunity Bursaries at this institution by October 31 2003		Number of first-year students awarded an Opportunity Bursary at another institution by October 31 2003, who are attending this institution in 2003-04	Funds required to make payments to first-year students in 2003-04 (£)	Adjustment to initial allocation from the Opportunity Bursaries Fund (£)
			Who are attending another institution in 2003-04	Who are attending this institution in 2003-04			
Excellence Challenge area		0.00	0.00	0.00	0.00	0.00	
Non-Excellence Challenge area		0.00	0.00	0.00	0.00	0.00	
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Second-year students

Where the student is from	Number of Opportunity Bursaries initially allocated by HEFCE in 2003-04 for second-year students	Number of second-year Opportunity Bursary award holders, who attended this institution in 2002-03		Number of second-year Opportunity Bursary award holders, who attended another institution in 2002-03, who are attending this institution in 2003-04	Funds required to make payments to second-year students in 2003-04 (£)	Adjustment to initial allocation from the Opportunity Bursaries Fund (£)
		Who are attending another institution in 2003-04	Who are attending this institution in 2003-04			
Excellence Challenge area		0.00	0.00	0.00	0.00	
Non-Excellence Challenge area		0.00	0.00	0.00	0.00	
Total	0.00	0.00	0.00	0.00	0.00	0.00

Third-year students

Where the student is from	Number of Opportunity Bursaries initially allocated by HEFCE in 2003-04 for third-year students	Number of third-year Opportunity Bursary award holders, who attended this institution in 2002-03		Number of third-year Opportunity Bursary award holders, who attended another institution in 2002-03, who are attending this institution in 2003-04	Funds required to make payments to third-year students in 2003-04 (£)	Adjustment to initial allocation from the Opportunity Bursaries Fund (£)
		Who are attending another institution in 2003-04	Who are attending this institution in 2003-04			
Excellence Challenge area		0.00	0.00	0.00	0.00	
Non-Excellence Challenge area		0.00	0.00	0.00	0.00	
Total	0.00	0.00	0.00	0.00	0.00	0.00

2002-03 Access and hardship monitoring return

Table 1: Continuing Bursaries and Access Bursaries

	Continuing Bursaries awarded		Access Bursaries awarded		Total	
	Number of bursaries	Total amount in bursaries (£)	Number of bursaries	Total amount in bursaries (£)	Number of bursaries	Total amount in bursaries (£)
Total	0.00	0.00	0.00	0.00	0.00	0.00

2002-03 Access and hardship monitoring return

Table 2a: Payments for hardship (excluding payments for part-time Fee Waivers, Continuing and Access Bursaries, and Opportunity Bursaries)

Table 2a(i): Payments for hardship (including payments made as loans)

Level	Mode	Age (years) at time of payment						Total		
		Under 21		21-24		25 and over		Number of applicants (successful + unsuccessful)	Number of successful applicants	Payments made (£)
		Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)			
Undergraduate	Full-time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Part-time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Postgraduate	Full-time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Part-time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Further education	Full-time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Part-time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Table 2a(ii): Bursary schemes through the Hardship Fund (a subset of the data in the above table)

	Number of successful applicants	Payments made (£)
Total	0.00	0.00

2002-03 Access and hardship monitoring return

Table 2b: Payments for fee waivers - part-time undergraduate students only

Reason for payment	Age (years) at time of payment						Total	
	Under 21		21-24		25 and over		Number of successful applicants	Payments made (£)
	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)		
Job-loss	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits/low income	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

2002-03 Access and hardship monitoring return

Table 3: Reasons for payment for hardship (including payments made as loans, excluding payments for part-time Fee Waivers, Continuing and Access Bursaries, and Opportunity Bursaries)

	Reason for payment																Total	
	Assistance with disability costs		Child care		Transport		Books and equipment		Non tuition fees (e.g. field trips)		Accommodation		Utility costs		Other or unspecified hardship			
	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)	Number of successful applicants	Payments made (£)
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

2002-03 Access and hardship monitoring return

Table 4: Loans for repayment

	Number of successful applicants	Paid out (£)	Repaid within year (£)	Repaid from previous years (£)	Outstanding within year (£)
Loans to students whose loan cheque from the SLC is delayed	0.00	0.00	0.00	0.00	0.00
Other loans	0.00	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.00	0.00

2002-03 Access and hardship monitoring return

Table 5: Periodic information and interest earned (Hardship/Bursary Fund and Fee Waiver Fund, excluding Opportunity Bursaries)

	Source of funds	1 September to 31 December	1 January to 31 March	1 April to 31 August	Total
Available funds for 2002-03	Add: Funds allocated by the HEFCE	0.00	0.00	0.00	0.00
	Add: Loans repaid from previous years	0.00	0.00	0.00	0.00
	Add: Funds brought forward from 2001-02	0.00	0.00	0.00	0.00
	Less: Funds used to repay outstanding loans from previous years*	0.00	0.00	0.00	0.00
	Add: Interest earned	0.00	0.00	0.00	0.00
Funds disbursed during 2002-03	Add: Funds paid to students (including those from loans repaid)	0.00	0.00	0.00	0.00
	Add: Interest used to defray audit costs, train staff or publicise funds	0.00	0.00	0.00	0.00
	Less: Loans repaid within year	0.00	0.00	0.00	0.00
Total available funds in 2002-03		0.00	0.00	0.00	0.00
Total funds disbursed in 2002-03		0.00	0.00	0.00	0.00

2002-03 Access and hardship monitoring return

Table 6: Summary

	Hardship/Bursary Fund	Fee Waiver Fund	Total	Total as percentage of available funds
Add: Funds allocated in 2002-03	0.00	0.00	0.00	
Add: Funds brought forward from 2001-02	0.00	-	0.00	
Add: Interest earned during 2002-03	0.00	-	0.00	
Add: Loans repaid from previous years	0.00	-	0.00	
Less: Funds used to repay outstanding loans from previous years	0.00	-	0.00	0.00
Less: Funds disbursed (including those from loans repaid)	0.00	0.00	0.00	
Add: Loans repaid with in year	0.00	-	0.00	0.00
Total funds remaining	0.00	0.00	0.00	0.00
Funds HEI wishes to carry over to 2003-04*			0.00	0.00
Funds to be reclaimed by HEFCE**			0.00	0.00

*This must be no greater than 10% of the total income for 2002-03 (funds allocated + funds brought forward + interest earned + loans repaid from previous years - funds used to repay outstanding loans from previous years)

**Note that funds to be reclaimed will be reclaimed via a deduction from the January 2004 payment

Note that for calculation purposes, funds brought forward from the previous year, loans repaid from the previous year, funds used to repay outstanding loans from previous years and interest earned are assumed to be part of the Hardship/Bursary Fund.

Please fill in the following for the person to contact with any queries about the return:

Contact name:

Contact telephone number:

Contact e-mail:

Contact 1	Contact 2 (optional)

Instructions for the signing-off process can be found in the guidance for completing the monitoring return, which institutions will receive in June 2003.

2002-03 Access and hardship monitoring return

Table 7: Opportunity Bursaries

First-year students

	Final number of first-year Opportunity Bursaries allocated by HEFCE for 2002-03	Number of students awarded first-year Opportunity Bursaries who attended this institution in 2002-03*	Total payments made to students in 2002-03 (£)	Remaining funding (£)
Where the student is from				
Excellence Challenge area		0.00	0.00	
Non-Excellence Challenge area		0.00	0.00	
Total	0.00	0.00	0.00	0.00

Second-year students

	Final number of second-year Opportunity Bursaries allocated by HEFCE for 2002-03	Number of students receiving second-year Opportunity Bursaries who attended this institution in 2002-03*	Total payments made to students in 2002-03 (£)	Remaining funding (£)
Where the student is from				
Excellence Challenge area		0.00	0.00	
Non-Excellence Challenge area		0.00	0.00	
Total	0.00	0.00	0.00	0.00

*This includes students who were offered a bursary at this institution and attended this institution plus students who were offered a bursary at a different institution but attended this institution.

List of abbreviations

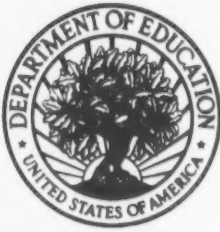
DfES	Department for Education and Skills
DSA	Disabled Students Allowance
DWP	Department for Work and Pensions
EAZ	Education Action Zone
ECJ	European Courts of Justice
EEA	European Economic Area (member states of the EU plus Norway, Iceland and Liechtenstein)
EiC	Excellence in Cities
ELE	Exceptional leave to enter
ELR	Exceptional leave to remain
EU student	One who is a national of a member state of the European Community or a child of such a person
FE	Further education
FEC	Further education college
FTE	Full-time equivalent
HE	Higher education
HEFCE	Higher Education Funding Council for England
HEI	Higher education institution
HESA	Higher Education Statistics Agency
ILE	Indefinite leave to enter
ILR	Indefinite leave to remain
IND	Immigration and Nationality Directorate of the Home Office
JSA	Job Seeker's Allowance
LEA	Local education authority
LSC	Learning and Skills Council
OfSTED	Office for Standards in Education
PGCE	Postgraduate Certificate in Education
SCITT	School Centred Initial Teacher Training
TTA	Teacher Training Agency

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87



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